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THE FOOD MARKETING INDUSTRY

1986

FMI

THE FOOD MARKETING INDUSTRY SPEAKS 1986

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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,500 members – food retailers and wholesalers and their customers. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of $150 billion – half of all grocery sales in the United States. More than three-fourths of the FMI membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 150 members from 40 nations.

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THE FOOD MARKET

1986

Retail Sales Gain Over Previous Year	**5.0%**
Whosesale Sales Gain Over Previous Year	**8.0%**
Weekly Sales Per Square Foot	**$8.43**
Sales Per Customer Transaction	**$16.33**
Sales Per Labor Hour	**$88.00**
Gross Margin With Warehouse	**24.0%**
Gross Margin Without Warehouse	**22.3%**
Net Profit (before taxes)	**1.8%**
Weekly Store Sales	**$206,543**

THE FOOD MARKETING INDUSTRY SPEAKS

The 1985 U.S. economy offered a mixed message. Growth was robust, continuing the trend from 1984, and inflation rose only 3.6 percent compared to an already low increase of 4.3 percent for 1984. Business investment increased to $380 billion, fueled by lower interest rates. The prime rate dropped to under 10 percent, almost half of the 1981 rate. Consumers saw an increase in their disposable income to over $11,000. At the same time, unemployment dropped to 7.2 percent.

Yet amid these optimistic returns, some darker signs appeared on the horizon. In 1985, the U.S. became a debtor nation for the first time since 1914 with the trade deficit reaching $148 billion and the federal deficit hitting $212 billion. The farm sector continued to face trying conditions.

The supermarket industry reflected the general economic trends. Growth in retail sales slowed to 5 percent in current dollars and stabilized at 3.6 percent in real dollars. In contrast, gross margins stabilized at 24 percent for companies without warehouses. Net profits also rose slightly to 1.8 percent in 1985 along with a small increase in weekly sales per square foot.

The Food Marketing Industry Speaks, 1986 report examines all of the interdependent parts of the industry that puts food on the tables of America: The food producer, the manufacturer, the wholesaler, and the retailer. It begins with a review of the economy in general, followed by an in-depth look at those aspects which directly affect the industry. It covers sales and profit trends, and provides a detailed look at several special interest areas.

The general merchandise/health and beauty aids department in retail stores is highlighted this year. The report also examines in detail the meat department, general merchandise, electronic funds transfer, and productivity by store type.

Much of the data are compiled through FMI's annual surveys of the industry. FMI gratefully acknowledges all those companies who have contributed their time and effort to fill out the questionnaires. A detailed explanation of the study is provided in the appendix.

Industry information is also drawn from other FMI research reports such as *Operations Review* and *Facts About Store Development*. The Institute would also like to acknowledge data gathered from the U.S. Departments of Agriculture and Commerce, and other government publications.

While this report contains the complete analysis for 1985, it does not include the detailed tabulations of survey data from which this analysis was developed. This information, providing a more thorough look at industry activity, is contained in a separate, supplemental report entitled *Detailed Tabulations from the Food Marketing Industry Speaks, 1986*. Another publication, *Trends-Consumer Attitudes and the Supermarket, 1986*, parallels *Speaks* by presenting the state of the industry from the consumer side. *Trends* explores consumer attitudes toward the economy and the supermarket, and analyzes changes in consumer concerns and shopping patterns.

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THE ECONOMIC SETTING

The Economic Climate

For the most part, the positive economic news of 1984 continued through 1985 with only a few major setbacks. Nineteen eighty-five brought the country into the third year of economic expansion. If this expansion continues as predicted, by the fall of 1986 it will be the second longest peacetime recovery in American history.

Many of the major economic growth indicators showed positive changes in 1985. Inflation, measured as the percent change in the Consumer Price Index (CPI), rose only 3.6 percent in 1985; lower than the 1984 figure of 4.3 percent but not quite down to the 1983 increase of 3.2 percent. The food-at-home and food-away-from-home portions of the CPI showed smaller increases in 1985 than in 1984, at 1.4 percent and 4 percent respectively, down from 3.7 percent and 4.2 percent in 1984.

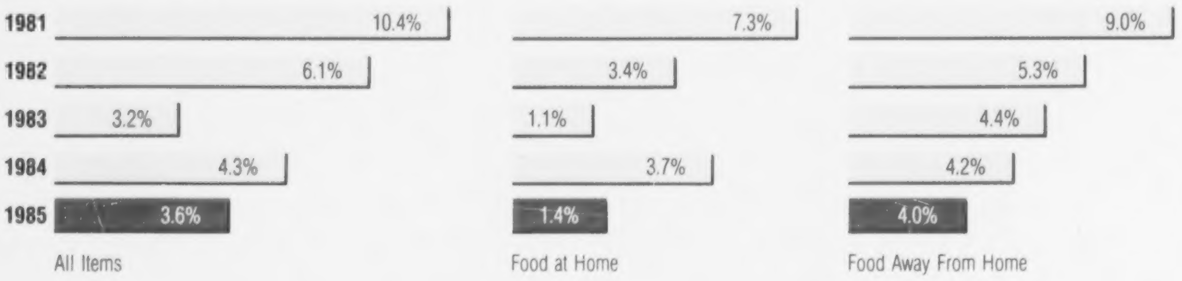
Along with the slowed consumer price increases, lower interest rates, a decrease in the unemployment rate and a continued growth of disposable income, there was an increase in total U.S. retail sales to $1,374 billion in 1985, up from $1,293 billion in 1984. Industrial investments also jumped from $352.88 billion in 1984 to $379.42 billion in 1985. In current dollars, business investments went from $354.44 billion to $386.41 billion. Additional positive economic news in 1985 included affordable interest rates for corporate customers and mortgage loans. The prime interest rate, the rate banks give their best corporate clients, fell more than two percentage points from 12.04 percent in 1984 to 9.93 percent in 1985, almost half of the 18.87 percentage mark of five years ago. Along with the drop in the prime rate came a substantial decrease in mortgage rates from an all time high of 15.1 percent in 1982 to 9.5 percent in July, 1985, for a year-long average of 10.8 percent.

Civilian unemployment fell to a six year low in 1985, with an average of 7.2 percent for the year. The unemployment rate has shown a steady decrease since the height of the recession in 1982. In 1982 it peaked at 9.7 percent, in 1983 it dropped to 9.6 percent, and fell again in 1984 to 7.4 percent.

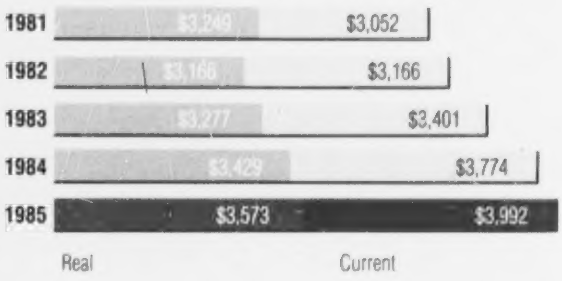
Disposable income, the income remaining after paying personal taxes, grew to $11,727 in current dollars and $10,504 in deflated dollars in 1985. For the food industry, this is significant, because not only did disposable income continue to grow in 1985, but the percent of disposable income spent on food also increased. In fact, from 1981 to the present, the percent of disposable income spent on food has remained steady, from 14.9 in 1981 to 15 percent in 1985.

The negative aspects of the 1985 economic picture included a record breaking trade deficit and an oil price slide which hurt many of the southern states. In 1985, the U.S. Federal budget deficit skyrocketed to an all time high of $212 billion along with a record trade deficit of $148 billion. These deficit highs made the U.S. a debtor nation for the first time since 1914.

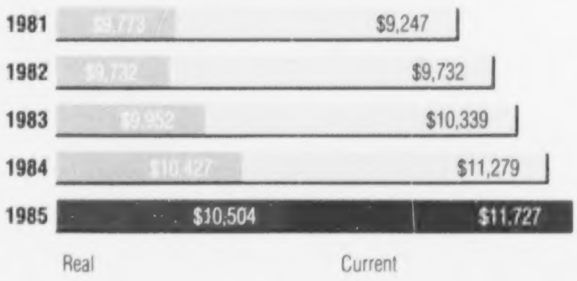
Consumer Price Index



Gross National Product (Billions) (1982 dollars)



Per Capita Disposable Income (1982 dollars)



Although consumers cheered plummeting gasoline and oil prices, the oil states, including Oklahoma, Texas, and Louisiana, slid into economic straits. On April Fools Day, 1985, spot oil prices dipped below $10 a barrel, a twelve year low.

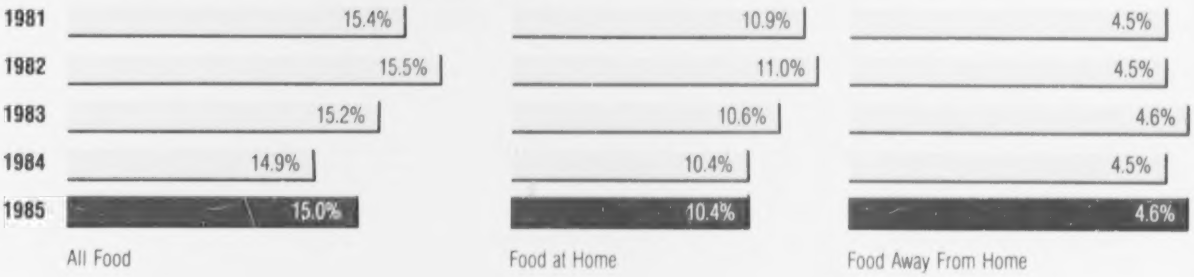
Food Production

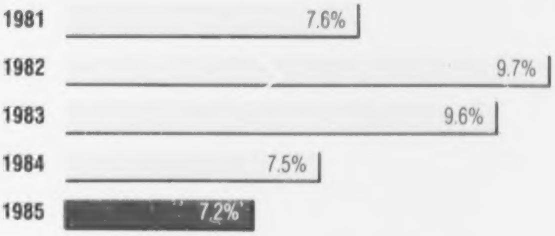
The farm community had another difficult year in 1985. Farm exports declined to $31.2 billion from the 1981 peak. In addition, net farm income dropped from $34 billion in 1984 to between $25 and $29 billion in 1985. Individual crop production varied with environmental and political factors.

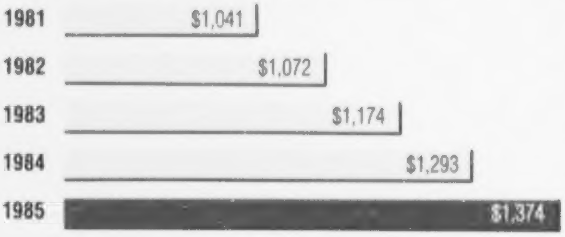
Both corn and milk set production records in 1985. Corn production jumped from 7,656 million bushels in 1984 to 8,865 million bushels in 1985. More milk per cow and three percent more cows raised milk production to 143.7 billion pounds in 1985.

Coffee production also increased in 1985, climbing from 11.95 billion pounds in 1984 to 13.05 billion pounds. Nineteen eighty-five showed a decline in wheat production due to many negative factors including a difficult planting season, crop switching, and reaction to two years of declining wheat prices.

Meat production for 1985 followed customer preferences. Poultry production increased from 15.6 billion pounds in 1984 to 16.5 in 1985, an increase attributable to stable production costs and the decrease in the output of red meat. Beef production did increase slightly in 1985 due to a four to five percent rise in slaughter weights, even though the number of cattle at slaughter was down before the government approved milk cow slaughter. Pork production remained constant from 1984 to 1985.


Percent Of Disposable Income Spent On Food


Civilian Unemployment

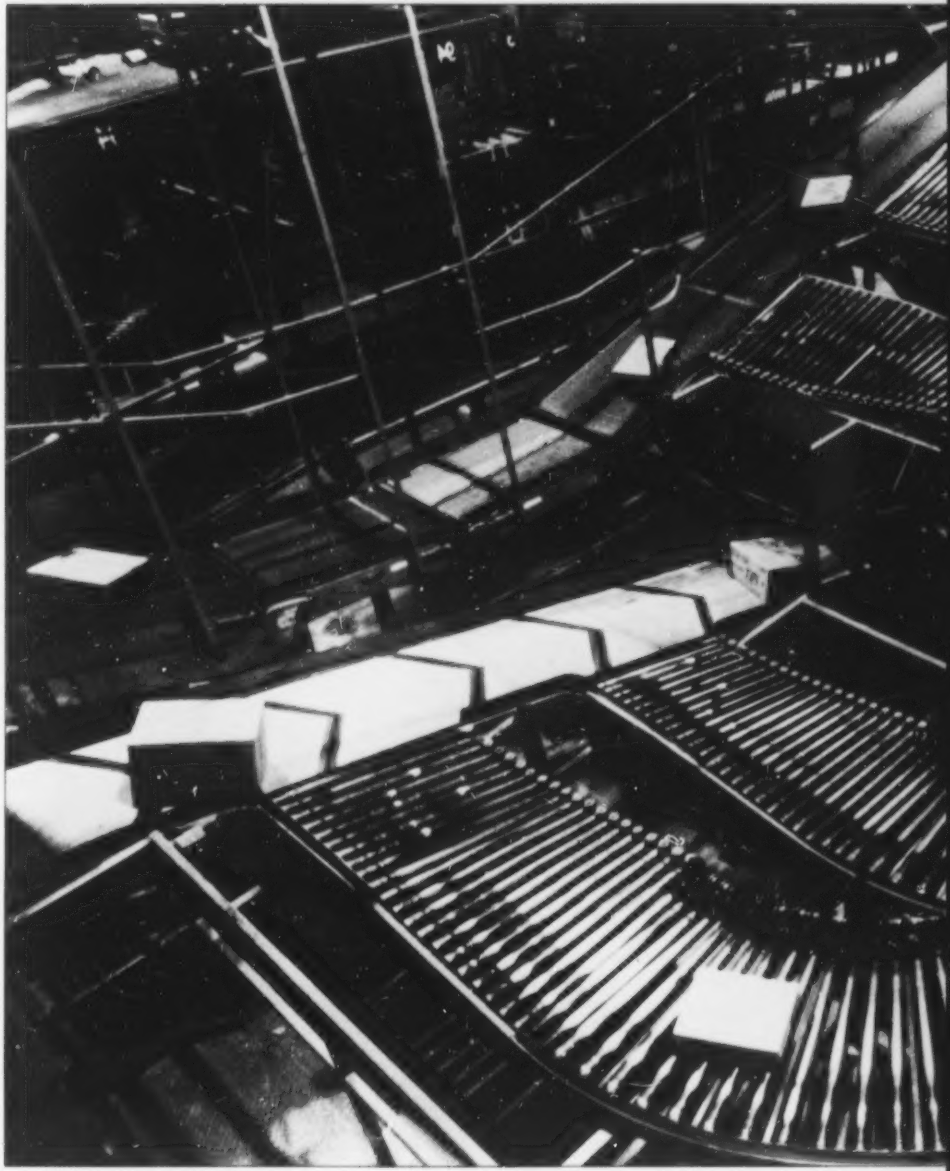

Total Retail Sales (billion)

Sales Increase Over 1984 By Quarters

	1st	2nd	3rd	4th
All retail stores	4.6%	6.8%	8.9%	5.3%
Grocery Stores	4.2%	4.4%	4.5%	5.3%
Restaurants	5.1%	7.3%	4.9%	5.7%

DISTRIBUTION CENTERS

Distribution centers are a major part of the link between producer and consumer. They are owned either by wholesalers who use them to distribute goods primarily to retail stores, or by retail companies, to keep their inventory in a central location for distribution to individual stores as needed.



Dry Grocery Distribution Centers

In creating a profile of a typical dry grocery distribution center the following characteristics were found:

- The centers averaged 250,000 square feet: Retail centers were 258,000 square feet with wholesaler centers typically smaller at 240,000 square feet.
- Each dry grocery center served 87 supermarkets.
- The dry grocery centers employed 100 people who shipped 182,905 cases per week.
- Each center carried 6,000 items with an annual inventory turnover rate of 15.
- While each dry grocery center received 178 inbound loads per week, each sent out 180 loads during that same period of time.
- One hundred sixty-two cases were selected per direct labor hour in 1985.

General Merchandise/ Health and Beauty Aid

General merchandise/health and beauty aid (GM/HaBA) distribution centers are typically much smaller than their dry grocery center counterparts. The median size for a

GM/HaBA center measured 44,950 square feet in 1985. The retail GM/HaBA center was typically 60,000 square feet and the wholesale centers were 31,500 square feet.

A profile of the typical GM/HaBA center shows the following:

- Items were almost equally selected from shelving (50.0 percent) and from flow racks (48.3 percent).
- There were typically 21 employees per center, with a range from 3 to 83 employees.
- GM/HaBA centers typically served 84 supermarkets and offered 3,663 items.
- Inbound truck loads totaled 41 per week, whereas there were typically 32 outbound loads per week.
- Nine hundred eighty units were received per direct labor hour with 482 units being stored and replenished per direct labor hour.

Number Of Shifts Operated Per Week In Distribution Centers

	All Centers	Wholesale Centers	Retail Centers
Dry Grocery			
5-7	17.4%	6.9%	27.8%
8-14	47.9%	48.6%	47.2%
15-20	27.1%	36.1%	18.1%
21 +	7.6%	8.3%	6.9%
GM/HaBA			
4	4.7%	5.1%	4.0%
5-7	53.7%	54.0%	48.0%
8-14	28.1%	28.2%	28.0%
15-20	7.8%	5.1%	12.0%
21 +	4.7%	2.6%	8.0%

Percent of Companies Reporting Methods Used In Dry Grocery Distribution Centers

Receiving	
Count each case	91.9%
Count selected supplier	4.7%
Sample supplier pallets	7.0%
Other	2.3%
Put Away	
Fork lift to reserve lot	83.7%
Pallet jack to aisle	44.2%
Other	3.5%
Replenishment	
Zone patrol	66.3%
Work list or cards	33.7%
Other	16.3%
Selection	
Order list	15.1%
Labels	43.0%
Other	3.5%

THE INDUSTRY

Wholesaling

Wholesaling is the important middle step between producer and retailer, both for goods and services.

After a drop during the early part of the last recession (1981 and 1982), wholesale sales have grown steadily for the past four years. In 1985, sales grew 8 percent in current dollars up from a 6.8 percent increase in 1984. In real dollars sales jumped from 3 percent in 1984 to 6.5 percent in 1985.

Wholesalers offer more than just goods. Eighty percent of the wholesalers told us that they offer half of all the retail services shown on a list of services provided. The services offered to retailers most often were an advertising program, product management and individual retail pricing.

Retailing

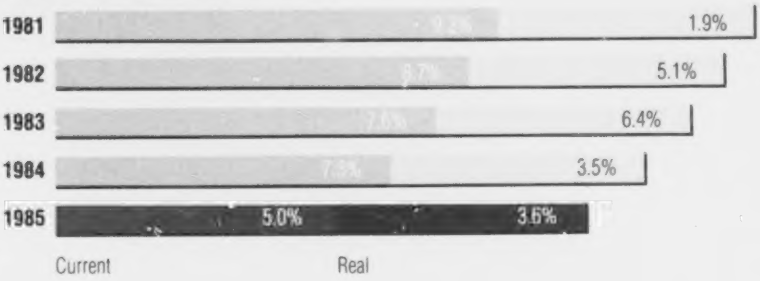
The retail supermarket is the industry's direct link to the consumer. In 1985 retail sales growth continued to slow in current dollars. For all stores, growth went from 7.3 percent in 1984 to 5 percent in 1985. For identical stores, those in operation for all of 1984 and 1985, the growth slowdown was just as prominent, falling from 5.6 percent to 3.6 percent.

In real dollars (which exclude inflationary effects), the rate of sales has fluctuated along with the economy. It reached a high of 6.4 percent in 1983, declined to 3.5 percent in 1984 and rebounded somewhat to 3.6 percent in 1985. Sales also increased slightly for identical stores in 1985—from 1.8 percent to 2.0 percent.

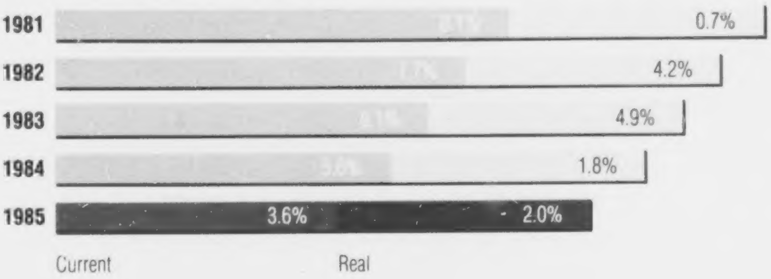
National retail sales for 1985 were down from last year. The 4.6 percent gain for the first quarter was much lower than the 14.6 percent gain for the first quarter of 1984. The 6.8 percent increase for the second quarter was little more than half of the 12.1 percent increase for the same period last year. The figures for the third and fourth quarters are fairly consistent with 1984.

The slow increase in restaurant sales has continued the trend indicated in last year's report. Restaurant sales declined from the 1983 double digit numbers to 9.1 percent in the first quarter of 1984 and below 7 percent in the second quarter. They have remained between 4.5 percent and 7.5 percent since that time.

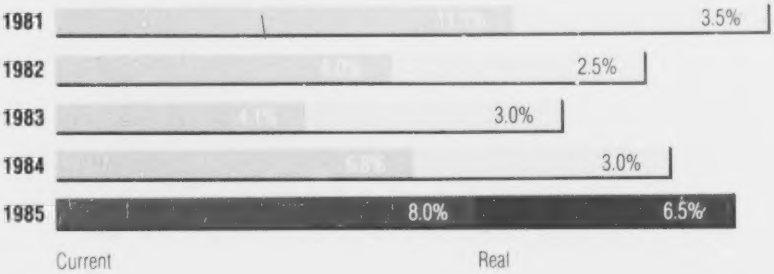
Retail Sales Increase



Identical Stores Sales Increase



Wholesale Sales Increase



Services Provided To Membership

Advertising program	87.8%
Product Management	87.8%
Individual Retail Pricing	85.4%
Real Estate & Store Engineering	82.9%
Equipment Procurement	82.9%
Gross margin Report/Item	82.9%
Handle Private Label	82.9%
Handle Generic Label	80.9%
Scanning Support	80.5%
Education/Training	78.0%
Retail Accounting	75.6%
Interior Decor & Design	73.2%
Member Payrool	68.3%
Equipment & Fixture Finance	68.3%
DSD System	68.3%
Lease Financing	65.9%
Space Allocation	61.0%
Discount Progress	56.1%

COMPANY PERFORMANCE

Gross Profit Margin

Gross profit margins, total sales minus the cost of goods sold, were fairly stable in 1985. For companies with their own warehouse, gross profit was 24 percent. Those without their own warehouse experienced a slight increase in profits from 21.6 percent in 1984 to 22.3 percent in 1985.

Net Profit Margin

Net profit before taxes increased again in 1985. Net profit, which is calculated by dividing gross profit by net sales was 1.8 percent in 1985, up from 1.6 percent in 1984. In 1985 the second and third quarters were the most profitable.

Productivity

In 1985, the typical customer spent $16.33 per supermarket outing, slightly over 14 percent more than the 1981 figure of $14.23. During these last five years, the average price per item rose from $1.19 to $1.31. Between 1984 and 1985, weekly sales rose from $175,900 to $206,543, despite the price per item remaining relatively stable at $1.31 during that time.

Productivity gains from 1984 to 1985 can be summarized as follows:

- The number of items carried per store rose from 15,379 in 1984 to 17,459 in 1985.
- Sales per square foot of selling area increased in current dollars from $8.00 to $8.43 and in real dollars from $2.73 to $2.84.
- In 1984, sales per customer transaction was $15.36; in 1985 it was $16.33.
- Weekly sales per checkout unit were $25,818, up from $22,253. This is an increase from $7,600 to $8,700 in real dollars.

More items have raised sales per square foot from $7.09 in 1981 to $8.43 in current dollars which translates into a slight gain in real dollars from $2.50 to $2.84.

The purchase of more and more non-food items at the supermarket is partly responsible—some 22 percent of supermarket purchases are now non-food items, according to the Census Bureau. A greater emphasis on time-saving techniques also contributed to the increase.

However, sales per labor hour did show a slight decline, from an average of $90.85 to $88.00 in 1985. In deflated terms, sales per labor hour declined from $31.04 in 1984 to $29.65 in 1985.

With respect to productivity by store format, combination stores led in two productivity categories—weekly sales per checkout unit, ($27,003), and typical weekly sales per store ($270,026) and also led in the number of items per store with 32,750.

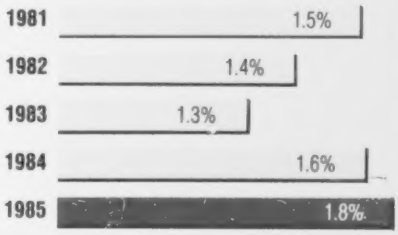
Warehouse stores led in sales per customer transaction at $22.00 followed by combination stores at $17.31 and super stores at $16.31. For conventional stores, the typical sale per customer transaction was $14.00.

Sales per labor hour was much higher for warehouse stores at $135.03 than any other store type. Combination stores reported $88.76, super stores $87.50 and conventional supermarkets $85.00.

Along with the highest sales per labor hour, warehouse stores also turned in the lowest retail price per item at $1.13. Conventional stores typically charged $1.30 per item, super stores charged $1.32, and combination stores charged $1.35.

Super stores, conventional stores and combination stores all experienced sales per square foot between $8.40 and $8.67. Warehouse stores lagged behind with $5.90 sales per square foot.

Net Profit Margin



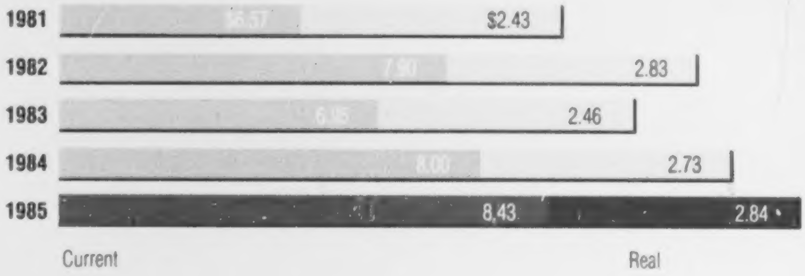
Weekly Sales

combination	$270,026
superstore	$230,000
warehouse	$150,000
conventional	$137,983

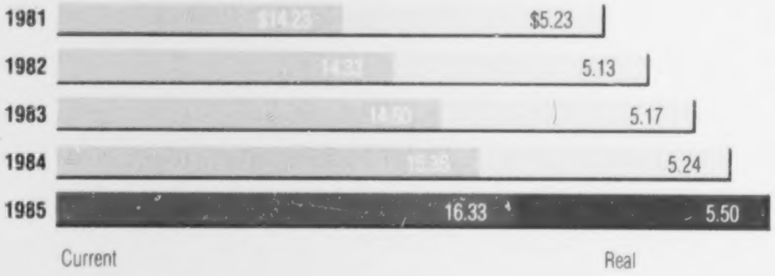
Weekly Sales Per Checkout

combination	$27,003
warehouse	$25,497
superstore	$24,240
conventional	$19,300

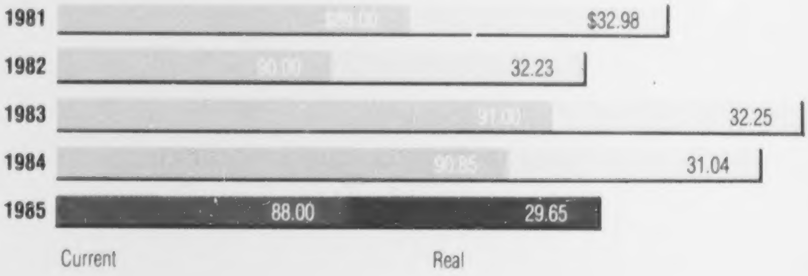
Sales Per Square Foot



Sales Per Customer Transaction



Sales Per Labor Hour



Number Of Items

combination	32,750
superstore	22,500
conventional	13,800
warehouse	10,000

Sale Per Customer Transaction

warehouse	$22.00
combination	$17.31
superstore	$16.31
conventional	$14.00

Sales Per Labor Hour

warehouse	$135.03
combination	$88.76
superstore	$87.50
conventional	$85.00

Retail Price Per Item

warehouse	$1.13
conventional	$1.30
superstore	$1.32
combination	$1.35

Sales Per Square Foot

superstore	$8.67
conventional	$8.48
combination	$8.40
warehouse	$5.90

OPERATIONS

Meat Department

As consumers' preferences change, so has the mix of products in the meat department. Beef sales declined from 39.3 percent of all meat sales to 37.6 percent, processed and frozen sales fell from 21.1 percent to 16.6 percent, and lamb declined just slightly from 1.9 percent to 1.7 percent.

On the up side, poultry went from 18.0 percent to 19.2 percent of all meat sales; fish and seafood increased from 2.9 percent to 4.3 percent; and pork accounted for 15.3 percent of all meat sales, up from 12.9 percent. Veal sales have remained at 1.4 percent for the past two years.

In 1985, the typical meat department had the following features:

- It took up 10 percent of a store's selling area and accounted for 18 percent of the company's sales.
- Five employees worked in the store's meat department.
- Wages, salaries and fringe benefits accounted for 8 percent of meat department sales.
- There were 150 fresh meat items.

USDA choice beef accounted for the vast majority (75.9 percent) of fresh beef sales. Almost 23 percent was ungraded or house brand and under one percent of all beef sales were graded prime or good. Fresh beef is almost always received at the supermarket as either subprimals (53 percent) or primals (43.2 percent). Only 2.4 percent was received as carcass and 1.4 percent as retail cuts.

Retailers seem to be moving toward meat supplied by packer direct deliveries which rose from 14.4 percent in 1984 to 21.1 percent in 1985. The amount of meat supplied from company-owned warehouses or processing plants fell from 69.6 percent to 62.5 percent. The remaining 16.4 percent of meat was supplied by wholesaler direct delivery.

As retailers strive to increase meat sales, they often turn to product-related services to attract customers. In the meat department, the services companies offered were: meat recipes (81.9 percent of stores); nutrition information (61.9 percent); store coupons (60.4 percent); and meat cutting (58.1 percent).

General Merchandise, Health and Beauty Aids

Supermarket owners are seeking to fill the "one-stop" shopping needs of their customers by expanding their food and non-food sections. General merchandise and health and beauty aids are two popular departments capable of fulfilling these extra needs. Almost 90 percent of all stores operate both such departments.

When asked why they operate a general merchandise department, 88.1 percent said it was to "offer more one-stop shopping"; this was followed by to "increase average gross margin," 83.9 percent; and 83.2 percent to "increase dollar profits."

The most frequently carried general merchandise products in 1985 were pet supplies, housewares, magazines and stationery. In the health and beauty aid department the most often carried products included shampoos, dental products, deodorants, and shaving items.

Slightly over two-thirds (67.8 percent) of the companies stated that housewares/kitchen items experienced the greatest sales growth in 1985 in the general merchandise department. These were followed by video rentals (56.4 percent) and film/film supplies (46.8 percent).

In the health and beauty aids department over three-fourths (78.1 percent) indicated that dental items had the greatest sales growth. Cold pain remedies followed at 52 percent with hair care products at 46.8 percent, vitamins at 36.2 percent, and eye care products at 24.9 percent, rounding out the top five sales leaders.

Because of the popularity of VCR's, over one-fifth of the companies (21.8 percent) plan on adding video rentals/supplies in the future. Furthermore, almost one-quarter of the companies want to capitalize on the growth in houseware items by increasing the number of those items.

In their health and beauty aid departments, 29.3 percent of the companies surveyed plan on adding over-the-counter (OTC) health care items, reflecting the health concerns of the American consumer. Second to OTC items for planned addition in these departments are ethnic products (8.1 percent), followed by cosmetics (7.1 percent) and vitamins (2.6 percent).

The typical general merchandise section:
- Took up 16 percent of the selling area,
- Carried 7,000 items, and
- Required nine labor hours per week

The typical health and beauty aid section:
- Occupied ten percent of the selling area,
- Carried 1,900 items, and
- Required 60 hours per week to staff

Automated Teller Machines/Electronic Funds Transfer

Automated teller machines (ATMs) are yet another facet of the overall storewide move towards "one-stop" convenience. As seen in the survey, it is this aspect of ATMs, not any particular savings to stores, which underlies their increasing prevalence. When retailers rated the machines on a scale of 1 to 5, with 5 indicating excellent, "ease of use" and "customer convenience" both received the highest ratings of 4 while store savings received the lowest ranking of 2.1.

Almost one-third (30.5) percent of all companies operated ATMs in 1985, reporting that 15.9 percent of all of their stores have ATMs. Twelve percent of all companies operate non-ATM electronic devices, which they have in 5.7 percent of their stores.

Companies that do not own their ATMs were most often compensated by the owners with a space and transaction fee (49 percent). More than 27 percent were compensated with just a transaction fee, 10.3 percent received a space rental fee and 12.9 percent by some other arrangement.

Cash dispensing was, at 79.4 percent of the transactions, overwhelmingly the most popular use for ATMs. Just over 13 percent of all transactions were balance inquiries, 4.3 percent were deposit taking and 1.3 percent were balance transfers.

In terms of future growth, it was found that one quarter of the companies without ATMs plan to add them within the next two years, and 10.8 percent expect to install non-ATM electronic financial services. More than 43 percent expect to install these ATMs within the next five years, and 29.1 percent intend to add non-ATM electronic financial services during the same period.

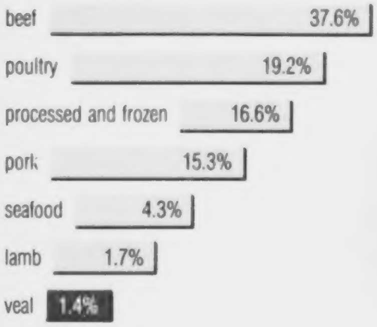
Only 3.3 percent of all companies operate EFT-POS direct debit at the checkout which is cleared through a network. Even a smaller percentage (1.2 percent) offer EFT-POS which is cleared through an automated clearinghouse.

Customer Service Center

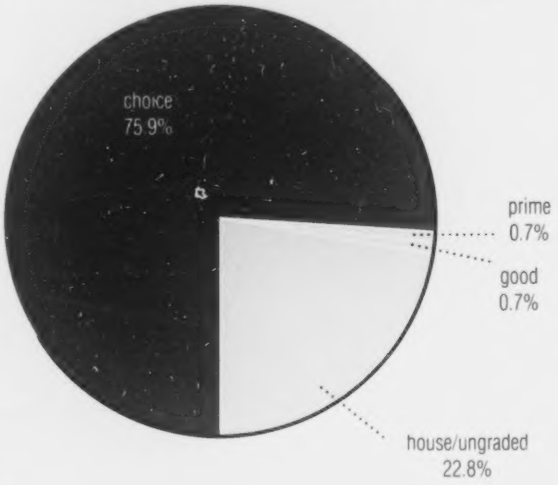
Ratings Of ATM

ease of use	4.0
customer convenience	4.0
overall performance	3.8
maintenance	3.8
hardware reliability	3.7
customer acceptance	3.6
customer useage	3.2
store savings	2.1

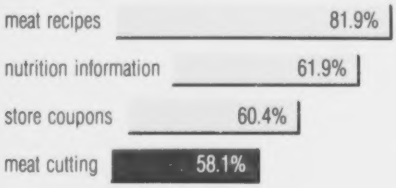
Mix Of Sales



Percentage Of Fresh Beef By USDA Type



Services Offered



GM Items With Greatest Sales Growth

housewares	67.8%
video rental	56.4%
film/film supplies	46.8%

Top Reasons For Carrying GM

offer more one-stop shopping	88.1%
increase average gross margin	83.9%
increase dollar profit	83.2%

HaBA Items Stores Carry

shampoos, dental products, deodorants, shaving items	99.9%
analegsics	99.8%
cold medicines	98.6%
hair conditioners	98.3%
mouthwashes	98.0%
vitamins	97.9%

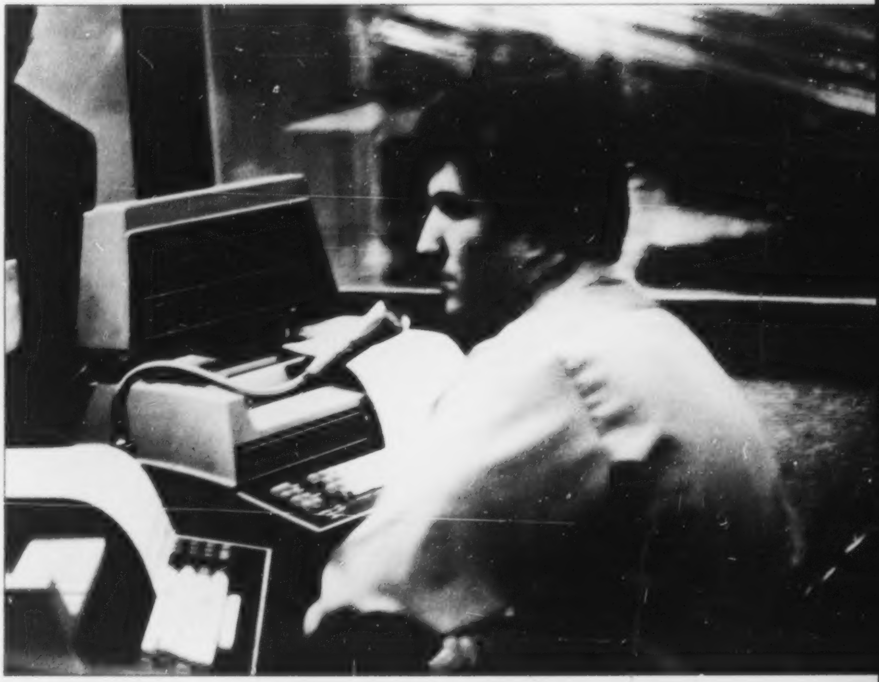
HaBA Items With The Greatest Sales Growth

dental items	78.1%
cold remedies	52.0%
hair care products	46.8%
vitamins	36.2%
eye care	24.9%

GM Items Stores Carry

pet supplies	99.6%
housewares	98.4%
magazines	96.7%
stationary	94.9%
books	84.0%
automotive supplies	82.1%
greeting cards	74.1%
toys	62.5%

TECHNOLOGICAL DEVELOPMENTS



The supermarket industry has a long history of joint industry projects aimed at improving the technological system. In 1985 a number of these key projects which will have long lasting effects on the industry were either completed or in progress.

As the implementation of direct-store delivery (DSD) control systems has spread, the diversity of DSD operations and technologies has grown commensurately. An industry task force is evaluating current store-door practices and technologies, and identifying opportunities for communication standards. The DSD/UCS study will begin with a review of current technologies and operations, to be followed by an evaluation of new technologies and trends affecting DSD.

A joint industry task force was created to study issues in shipping container design, with emphasis on the following topics: Improvement of the dry grocery system through shipping container design, identification of the most damage prone products, examination of compliance with voluntary guidelines, and development of packaging recommendations.

Several of the task force's recommendations call for immediate action. First among these is the suggestion that both manufacturers and distributors examine their products for compliance with industry guidelines. Also suggested is that distributors collect data on causes of damage for the most damage prone products. Distributors should then establish training programs which emphasize proper material handling techniques.

The task force also recommended that, in the near future, the industry establish three more task forces. The first of these will be created to study standardization of shipping containers for products in like retail packs. Another will be responsible for developing improvements in bag design and/or bag unit load design. The final group will review these preliminary performance standards for shipping containers and make recommendations to the industry.

Direct Product Profit (DPP), a management support system which measures an individual product's actual profit contribution, is growing in popularity. The increase in computer sophistication and data base usage encouraged food distributors to begin looking at using DPP as a replacement for gross margin as a quantifier for distribution center and store efficiencies.

Companies are finding that DPP and its applications enable them to identify expense and income factors and make rational decisions effecting their costs and profits. In order to help provide a retailer-based DPP model, FMI coordinated the development of a Unified method with the assistance of all areas of the food manufacturing and distribution community. The Unified Direct Product Profit (DPP) Model has been completed for dry grocery, frozen and refrigerated products. Currently under development are new or additional documentation for: shrink, coupons, frozen/dairy, display, repack, cigarettes, and beverage/returns.

STORE DEVELOPMENT

Store Activity

Last year's store developments encompassed a wide variety of activity. Almost 20 percent of all supermarkets were either newly opened, closed, acquired, or remodeled. The majority of this activity was in the form of remodelings, followed by closings, new construction, and acquisitions. In 1985, retailers reported less new store construction and store closings but double the rate of major remodelings.

Of all stores in operation as of December 31, 1985, 53.9 percent were conventional stores. Super stores accounted for more than 32 percent of all stores, 9.1 percent were combination stores and 3.7 percent were warehouse. Typically, these supermarkets were remodeled 6.7 years ago. More than 78 percent of all supermarkets were leased—70.8 percent from an outside company and 8 percent from a subsidiary or parent company.

New Stores

New store size along with the cost of building a new supermarket continued to grow in 1985. A new store was typically 40,000 square feet in 1985, up slightly from the 1984 median size of 39,600 square feet. The selling area in new stores was generally 28,000 square feet or approximately 70 percent of the total store area. For new stores, the most popular store format was the super store which accounted for 49.2 percent of all these new stores.

Construction usually cost the supermarket owner about $60.00 per square foot. These costs break down to $30.70 per square foot for the building and $29.00 per square foot for equipment, fixtures and decorations. An additional cost for new store owners is the cost of opening inventory, for which the median cost was $600,000 in 1985. For smaller stores, opening inventory was $285,000 and for larger stores it cost $950,000.

The minimum cost for renting a new store typically ran $5.86 per square foot per year. Overages were 0.8 percent of sales, bringing the total rent to $6.20 per square foot.

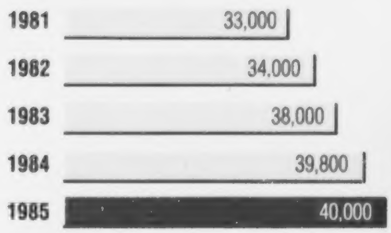
Store Closings

More than four percent of all supermarkets were closed in 1985. This figure is down from the 1984 figure of 6.9 percent and is almost equal to the 1983 closings of 4.3 percent. Of all of the supermarkets closed in 1985, more than two-thirds were conventional stores, one-quarter were super stores, and the remaining 8.4 percent were either combination stores, warehouse stores or other types.

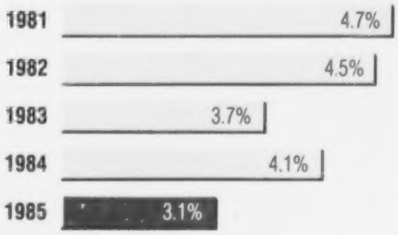
Remodelings

Remodelings typically cost $17.00 per square foot in 1985. For smaller companies the cost was $6.95 per square foot; for larger companies the cost typically totalled $21.00 per square foot. The typical major remodeling cost $400,000, down from $500,000 in 1984.

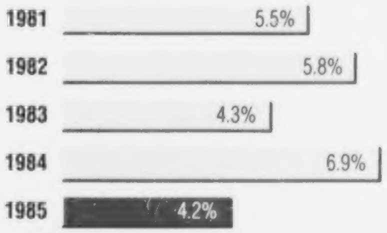
New Store Total Areas



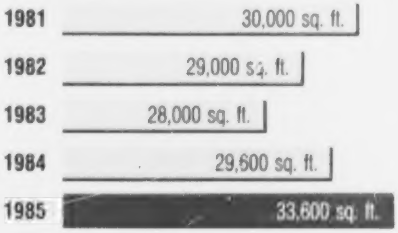
New Store Openings



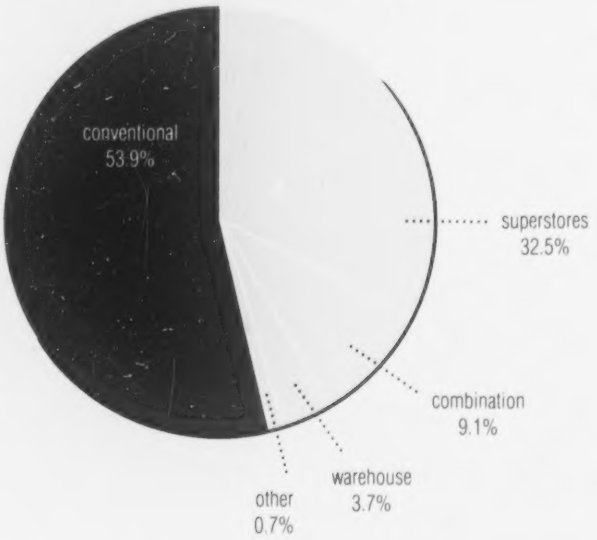
Store Closings



Total Store Size



All Stores In Operation By Type



APPENDIX

Trends In Operating Results

	1981	1982	1983	1984	1985
Gross Profits with Warehouse	23.0%	23.4%	23.7%	24.1%	24.0%
Gross Profit Without Warehouse	20.9%	21.2%	21.5%	21.6%	22.3%
Sales Per Labor Hour	$89.00	$90.00	$91.00	$90.85	$88.00
Sales Per Square Foot	$ 6.75	$ 7.90	$ 6.95	$ 8.00	$ 8.43
Sales Per Customer Transaction	$14.23	$14.33	$14.60	$15.36	$16.33
Average Hourly Labor Cost*	$ 7.64	$ 7.93	$ 8.12	$ 8.58	$ 8.99
Store Labor Expense	8.5%	8.8%	8.8%	8.9%	8.6%
Fringe Benefit Expense	2.0%	2.1%	2.2%	2.3%	2.9%
Net Profit (before taxes)	1.4%	1.5%	1.3%	1.6%	1.8%

---

*Excluding fringe benefits

About the Study

This year's report is the result of food marketing companies' participation in several FMI surveys: Retail Operations, General Merchandise/Health and Beauty Aids, Electronic Funds Transfer, Meat Department, Distribution Center Operations, Operations Review, and Facts About Store Development. Members as well as nonmembers were invited to provide company data in many of the surveys. The sample descriptions for the Retail, Distribution Center, General Merchandise/Health and Beauty Aids, and Electronic Funds Transfer questionnaires are presented on the next page. These numbers represent information from approximately 20 percent of the companies invited to participate.

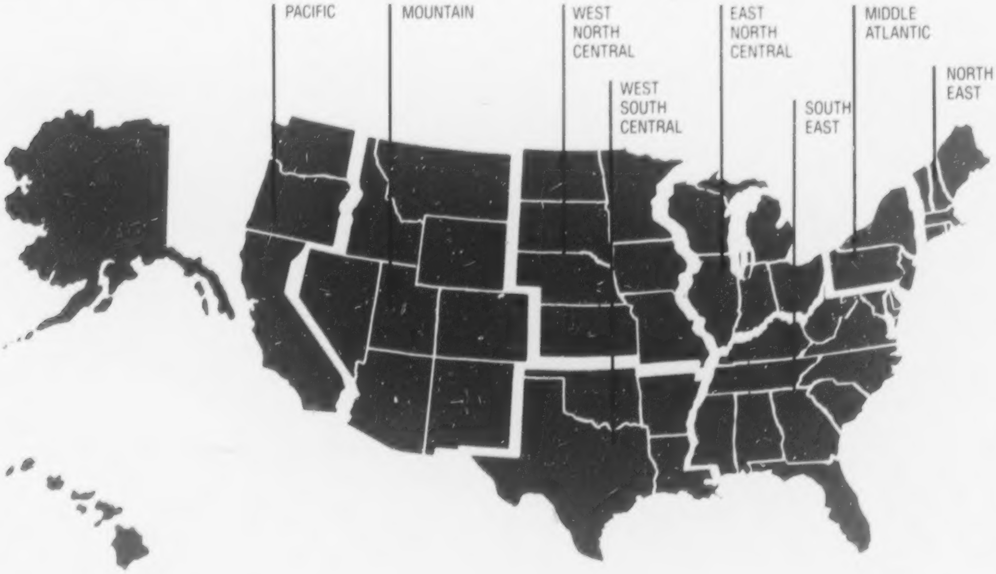
All data shown in this report are median figures, except where noted. Medians provide a better industry average because the figures are not subject to distortion by unusual extremes. This is very important when a few companies differ sharply from the market average.

When measuring real growth in retail sales and productivity, *FMI Speaks* uses the CPI food-at-home index and its annual percentage increase as deflators. To deflate a dollar figure, the CPI food-at-home number is used. For example, to deflate 1985 "sales per square foot" (see page 10) divide the current dollar figure ($8.43) by the 1985 CPI food-at-home index number (296.8), then multiply the total by 100 ($8.43/296.8 × 100 = $2.84 "sales per square foot" in real or deflated dollars). On the other hand, to deflate 1985 "retail sales increase" (page 10), add one to the 1985 current dollar percentage (1 + .05); multiply this by the inverse of the 1985 CPI food-at-home percent change plus one (1/1.014). The deflated number is 3.5%. The table below charts the CPI food-at-home index and percentage increase in the index.

Index For Deflating Annual Supermarket Sales

	CPI Food at Home	% Increase
1981	269.9	7.3
1982	179.2	3.4
1983	282.2	1.1
1984	292.6	3.7
1985	296.8	1.4

In this report, FMI defines a supermarket as a retail food store with annual sales of at least $2 million. This report is a summary of key findings of the surveys. Readers who have the need for more detailed facts and figures can find the supporting tables for this report in the companion reports entitled *Detailed Tabulations* from the *Food Marketing Industry Speaks, 1986* and in *Facts About Store Development.*


PACIFIC
MOUNTAIN
WEST NORTH CENTRAL
WEST SOUTH CENTRAL
EAST NORTH CENTRAL
SOUTH EAST
MIDDLE ATLANTIC
NORTH EAST

Sample Description For Food Marketing Industry Speaks

Retail Operations Questionnaire

(Base) Retail Sales millions	Sample Companies (283)
Under $10	27.2%
$10-$30	19.5%
$31-$100	20.7%
$101-$250	13.0%
$251-$500	8.1%
Over $500	11.4%
	100.0%

EFT Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (354)
Under $10	33.9%
$10-$30	20.6%
$31-$100	15.3%
$101-$250	10.2%
$251-$500	7.3%
Over $500	12.7%
	100.0%

Distribution Center Operations Questionnarie

	Sample Wholesale Companies (41)	Sample Retail Companies (50)
$31-$100	17.1%	4.0%
$101-$250	29.3%	20.0%
$251-$500	17.1%	20.0%
Over $500	36.5%	56.0%
	100.0%	100.0%

GM/HaBA Operations Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (197)
Under $10	32.9%
$10-$30	16.8%
$31-$100	19.6%
$101-$250	11.2%
$251-$500	7.0%
Over $500	12.6%
	100.0%

Retail Meat Operations Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies 280
Under $10	33.6%
$10-30	19.6%
31-$100	19.6%
$101-$250	9.3%
$251-$500	8.2%
Over $500	10.7%
	100.0%

READER'S COMMENT FORM

Report: The Food Marketing Industry Speaks, 1986

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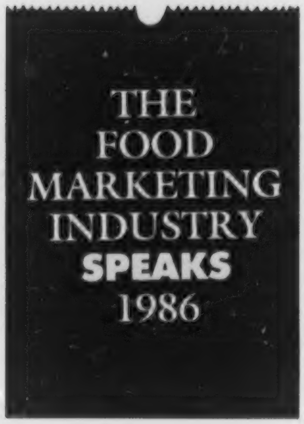
DETAILED TABULATIONS

Detailed Tabulations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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1500 members—food retailers and wholesalers and their customers. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of $150 billion-half of all grocery sales in the United States. More than three-fourths of the FMI membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 150 members from 40 nations.

Foreword

This publication is the companion report to The Food Marketing Industry Speaks, 1986. It contains the detailed tabulations for the information summarized in that report.

An annual survey of food wholesalers and retailers is the primary source of information for this report. Any data not taken from FMI's Speaks surveys are indicated by a footnote.

Data are for 1985. Company sales data are reported on an annual basis; productivity data, sales per labor hour, square foot or transaction, are reported on a weekly basis.

Except where noted, averages in these tables are mean figures; all others are medians. A median represents the halfway or middle figure when all figures are listed in order from the smallest to the largest. Medians are only presented when four or more companies in a category answered the question, except for distribution centers when it is three or more.

In addition to presenting data for wholesale and retail operations, Speaks, 1986 also includes a section on dry grocery and general merchandise and health and beauty aids centers. Figures in this section are presented for both wholesalers and retailers, as well as for all companies.

Subject areas explored in depth this year are the meat department, the general merchandise and health and beauty aids department in retail stores and electronic funds transfer.

Data for store profiles are found in Tables 61A and 61B. In these tables, sales and productivity figures are presented for four different types of grocery stores. For example, average sale per customer transaction is shown for conventional stores, super stores, combination stores and warehouse stores.

In order to insure the confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

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GEOGRAPHIC REGION OF WHOLESALE HEADQUARTERS

	ALL WHOLESALE COMPANIES	1985 WHOLESALE SALES (MILLIONS OF DOLLARS)				WHOLESALE AFFILIATION		
		UNDER 101	101-250	251-500	OVER 500	COOPERATIVE	VOLUNTARY	UNAFFILIATED
ALL COMPANIES	41	7	12	7	15	16	22	3
NORTHEAST	9.8	14.3	16.7	14.3	-	6.3	13.6	
MIDDLE ATLANTIC	17.1	28.6	16.7	14.3	13.3	18.8	13.6	
EAST NORTH CENTRAL	29.3	42.9	33.3	-	33.3	31.3	27.3	
WEST NORTH CENTRAL	2.4	-	-	-	6.7	-	4.5	
SOUTHEAST	19.5	14.3	16.7	57.1	6.7	12.5	27.3	
WEST SOUTH CENTRAL	9.8	-	16.7	-	13.3	12.5	9.1	
MOUNTAIN	-	-	-	-	-	-	-	
PACIFIC	7.3	-	-	-	20.0	18.8	-	
CANADA	4.9	-	-	14.3	6.7	-	4.5	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 2
TYPICAL PERCENT CHANGE IN WHOLESALE SALES 1984 VS 1985

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	8.0	2.8	17.7	34
REGION				
NORTHEAST	12.3	7.5	22.9	4
MIDDLE ATLANTIC	2.4	-2.3	12.8	5
EAST NORTH CENTRAL	7.2	5.8	8.3	10
WEST NORTH CENTRAL				1
SOUTHEAST	10.8	2.5	19.5	7
WEST SOUTH CENTRAL	23.3	11.3	26.7	4
MOUNTAIN				0
PACIFIC				2
CANADA				1
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
UNDER 101	10.9	4.3	12.8	7
101-250	5.8	2.4	7.5	9
OVER 250	8.2	6.9	19.8	18
NUMBER OF SUPERMARKETS SERVED				
1-10				1
11-50	10.8	4.3	17.7	7
51-100	8.1	.6	19.7	9
OVER 100	7.5	2.8	12.1	17
WHOLESALE AFFILIATION				
COOPERATIVE	10.0	4.1	18.8	12
VOLUNTARY	7.7	2.6	11.6	20
UNAFFILIATED				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 3
PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO -- SUMMARY TABLE OF MEANS

	ALL WHOLESALE COMPANIES	1985 WHOLESALE SALES (MILLIONS OF DOLLARS)			
		UNDER 101	101-250	251-500	OVER 500
TOTAL	36	7	12	5	12
INDEPENDENT FOOD STORES	57.0	72.5	72.1	46.2	55.9
OTHER FOOD CHAINS	22.5	0	8.6	3.7	27.0
COMPANY OWNED STORES	13.3	14.0	9.1	37.2	11.1
CONVENIENCE STORES	3.9	12.6	7.4	3.5	3.2
FOOD SERVICE/INSTITUTIONAL	2.7	.8	1.5	3.9	2.8
OTHER	.6	0	.6	5.5	0

NOTE: DATA WEIGHTED BY 1985 SALES

TABLE 4
TYPICAL SALES PER RETAIL STORE SERVED -- IN MILLIONS OF DOLLARS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	2.70	1.70	4.53	41
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
UNDER 101	3.28	2.31	3.84	7
101-250	2.06	1.00	3.27	12
OVER 250	3.30	1.70	4.88	22
WHOLESALE AFFILIATION				
COOPERATIVE	2.65	1.61	4.35	16
VOLUNTARY	2.82	1.67	3.91	22
UNAFFILIATED				3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 5
SERVICES PROVIDED TO MEMBERSHIP **

	ALL WHOLESALE COMPANIES	1985 WHOLESALE SALES (MILLIONS OF DOLLARS) UNDER 101	101-250	251-500	OVER 500
TOTAL	41	7	12	7	15
ADVERTISING PROGRAM	87.8	71.4	91.7	100.0	86.7
PRODUCT MOVEMENT DATA	87.8	71.4	91.7	100.0	86.7
INDIVIDUAL RETAIL PRICING	85.4	71.4	83.3	100.0	86.7
REAL ESTATE & STORE ENGINEERING	82.9	57.1	83.3	100.0	86.7
EQUIPMENT PROCUREMENT	82.9	71.4	83.3	85.7	86.7
GROSS MARGIN REPORT BY ITEM	82.9	57.1	91.7	85.7	86.7
HANDLE PRIVATE LABEL	82.9	71.4	83.3	85.7	86.7
HANDLE GENERIC LABEL	80.5	71.4	91.7	85.7	73.3
SCANNING SUPPORT	80.5	71.4	91.7	57.1	86.7
EDUCATION/TRAINING	78.0	71.4	58.3	100.0	86.7
RETAIL ACCOUNTING	75.6	42.9	75.0	100.0	80.0
INTERIOR DECOR & DESIGN	73.2	28.6	83.3	85.7	80.0
MEMBER PAYROLL	68.3	42.9	66.7	71.4	80.0
EQUIPMENT & FIXTURE FINANCING	68.3	28.6	58.3	85.7	86.7
DSD SYSTEM	68.3	28.6	66.7	71.4	86.7
LEASE FINANCING	65.9	42.9	50.0	71.4	86.7
SPACE ALLOCATION	61.0	42.9	50.0	57.1	80.0
DISCOUNT PROGRAMS	56.1	14.3	41.7	85.7	73.3
OTHER	9.8	-	-	-	26.7

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

WHOLESALE OPERATIONS

TABLE 6
PROFILE OF PARTICIPATING COMPANIES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL COMPANIES	91	8	16	22	3	15	11	4	9	3
RETAILERS	54.9	50.0	56.3	45.5		46.7	63.6	100.0	66.7	
COOPERATIVE WHOLESALERS	17.6	12.5	18.8	22.7		13.3	18.2	-	33.3	
VOLUNTARY WHOLESALERS	24.2	37.5	18.8	27.3		40.0	18.2	-	-	
UNAFFILIATED WHOLESALERS	3.3	-	6.3	4.5		-	-	-	-	

DRY GROCERY DISTRIBUTION CENTER OPERATIONS

TABLE 7
TYPICAL TOTAL AREA IN SQUARE FEET OF THE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	250,000	165,000	350,000	145
RETAIL CENTERS	258,000	171,500	358,000	72
WHOLESALE CENTERS	240,000	155,000	346,000	73

TABLE 8
TYPICAL NUMBER OF EMPLOYEES IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	100	56	160	145
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	22	13	33	13
100,000-199,999	54	39	80	34
200,000-299,999	83	65	120	41
300,000-399,999	151	130	177	29
400,000 OR MORE	250	161	326	28

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 9
TYPICAL NUMBER OF SUPERMARKETS SERVED PER DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	87	55	165	140
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	23	9	49	12
100,000-199,999	60	40	110	33
200,000-299,999	75	61	135	40
300,000-399,999	135	60	238	28
400,000 OR MORE	168	87	268	27

TABLE 10
TYPE OF SELECTION METHOD IN DRY GROCERY DISTRIBUTION CENTER/SECTION

		SIZE OF DRY GROCERY DISTRIBUTION CENTER/SECTION				
	ALL CENTERS	LESS THAN 100,000	100,000 TO 199,999	200,000 TO 299,999	300,000 TO 399,999	400,000 OR MORE
ALL CENTERS	137	13	33	40	25	26
MANUAL/CONVENTIONAL SELECTION	88.3	100.0	97.0	82.5	80.0	88.5
SELECT TO CONVEYOR	11.7	-	3.0	17.5	20.0	11.5

TABLE 11
TYPICAL NUMBER OF CASES SHIPPED PER WEEK IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	182,905	80,000	312,984	138
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	23,603	12,806	33,000	13
100,000-199,999	78,000	60,780	96,000	33
200,000-299,999	174,500	100,000	200,000	39
300,000-399,999	300,000	244,369	340,000	27
400,000 OR MORE	449,000	350,000	600,000	26

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 12

TYPICAL NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	177	97	528	119
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	234	170	720	10
100,000-199,999	239	115	514	26
200,000-299,999	131	94	278	32
300,000-399,999	170	89	856	27
400,000 OR MORE	220	95	806	24

TABLE 13

TYPICAL NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	162	137	200	135
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	142	113	204	12
100,000-199,999	160	139	201	33
200,000-299,999	172	137	208	39
300,000-399,999	155	137	200	26
400,000 OR MORE	170	150	187	25

TABLE 14

TYPICAL NUMBER OF PALLETS STORED AND REPLENISHED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	15	10	21	99
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	10	9	20	5
100,000-199,999	16	13	24	20
200,000-299,999	15	10	19	28
300,000-399,999	15	12	19	21
400,000 OR MORE	14	10	24	25

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 15
TYPICAL NUMBER OF INBOUND TRUCK LOADS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	178	96	300	135
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	30	14	63	12
100,000-199,999	102	70	124	29
200,000-299,999	175	123	233	40
300,000-399,999	280	197	350	26
400,000 OR MORE	384	315	555	28

TABLE 16
TYPICAL NUMBER OF INBOUND RAIL CARS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	2	0	10	133
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	0	0	1	10
100,000-199,999	0	0	1	29
200,000-299,999	2	0	10	38
300,000-399,999	8	2	23	28
400,000 OR MORE	4	0	18	28

TABLE 17
TYPICAL NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	180	111	324	143
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	40	20	47	13
100,000-199,999	112	90	151	34
200,000-299,999	174	132	206	41
300,000-399,999	300	250	360	29
400,000 OR MORE	425	335	550	26

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 18

TYPICAL NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION ALL CENTERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	6000	4570	6900	143
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	2000	1000	3700	13
100,000-199,999	5900	4431	6900	34
200,000-299,999	6000	4800	6800	41
300,000-399,999	6277	4975	7149	28
400,000 OR MORE	6400	5728	7300	27

TABLE 19

TYPICAL NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION WHOLESALE CENTERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	6600	6000	7800	73
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	3300	1500	3720	7
100,000-199,999	6575	5300	7250	20
200,000-299,999	6676	6000	8000	18
300,000-399,999	7200	6500	8500	13
400,000 OR MORE	6926	6200	8000	15

TABLE 20

TYPICAL NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION RETAIL CENTERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	5080	4200	6000	70
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	1062	870	2000	6
100,000-199,999	4664	2800	5690	14
200,000-299,999	5020	4000	6000	23
300,000-399,999	5000	4570	6300	15
400,000 OR MORE	6257	5464	6400	12

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 21

TYPICAL NUMBER OF INVENTORY TURNS IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	15	13	18	135
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	12	10	13	13
100,000-199,999	14	12	17	33
200,000-299,999	15	14	17	37
300,000-399,999	17	15	20	26
400,000 OR MORE	18	15	22	26

TABLE 22

CURRENT SCRATCH RATE IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	2.5	.5	5.0	128
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	5.6	4.8	6.6	6
100,000-199,999	2.3	.3	5.0	32
200,000-299,999	2.5	1.0	5.0	39
300,000-399,999	2.2	.4	5.0	25
400,000 OR MORE	1.6	.5	4.4	26

TABLE 23

TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK IN WHOLESALE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL WHOLESALE CENTERS	375	215	600	69
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 101	161	148	450	7
101-250	415	214	503	8
OVER 250	388	250	700	54

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 24
TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL RETAIL CENTERS	196	125	286	70
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 101				2
101-250	90	50	120	7
251-500	199	175	240	14
OVER 500	208	140	302	47

TABLE 25
TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION BY SELECTION METHOD

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL RETAIL CENTERS	196	125	286	70
MANUAL/CONVENTIONAL SELECTION	193	122	300	58
SELECT TO CONVEYOR	207	160	225	10

TABLE 26
SHIFTS PER WEEK, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	144	72	72
SHIFTS PER WEEK			
FIVE TO SEVEN	17.4	27.8	6.9
EIGHT TO FOURTEEN	47.9	47.2	48.6
FIFTEEN TO TWENTY	27.1	18.1	36.1
TWENTY-ONE OR MORE	7.6	6.9	8.3
ALL CENTERS	142	69	73
DAYS OF OPERATION PER WEEK			
FIVE	38.0	44.9	31.5
SIX	41.5	37.7	45.2
SEVEN	20.4	17.4	23.3
ALL CENTERS	144	72	72
EMPLOYEES UNIONIZED			
YES	76.4	68.1	84.7
NO	23.6	31.9	15.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 27

TYPICAL NUMBER OF CASES RECEIVED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	455	285	855	128
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	440	281	856	10
100,000-199,999	400	257	584	31
200,000-299,999	418	286	667	34
300,000-399,999	732	425	1037	26
400,000 OR MORE	558	310	1000	27

WHOLESALE OPERATIONS

TABLE 28

PERCENTAGE OF COMPANIES USING FOLLOWING METHODS IN DRY GROCERY DISTRIBUTION CENTERS **

				1985 SALES (MILLIONS OF DOLLARS)			
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 101	101-250	251-500	OVER 500
TOTAL COMPANIES	86	47	39	8	21	17	40
RECEIVING							
COUNT EACH CASE	91.9	95.7	87.2	100.0	95.2	88.2	90.0
COUNT SELECTED SUPPLIER	4.7	2.1	7.7	-	4.8	5.9	5.0
SAMPLE SUPPLIER PALLETS	7.0	4.3	10.3	12.5	9.5	5.9	5.0
OTHER	2.3	-	5.1	-	-	5.9	2.5
PUT AWAY							
FORK LIFT TO RESERVE SLOT	83.7	83.0	84.6	87.5	81.0	94.1	80.0
PALLET JACK TO AISLE	44.2	36.2	53.8	37.5	33.3	29.4	57.5
OTHER	3.5	-	7.7	-	-	5.9	5.0
REPLENISHMENT							
ZONE PATROL	66.3	66.0	66.7	75.0	71.4	58.8	65.0
WORK LIST OR CARDS	33.7	25.5	43.6	50.0	19.0	35.3	37.5
OTHER	16.3	17.0	15.4	-	9.5	5.9	27.5
SELECTION							
ORDER LIST	15.1	21.3	7.7	12.5	19.0	5.9	17.5
LABELS	93.0	89.4	97.4	100.0	81.0	100.0	95.0
OTHER	3.5	2.1	5.1	-	-	5.9	5.0
LOADING							
CASE DEAD PILE	15.1	10.6	20.5	62.5	4.8	5.9	15.0
PALLETS	93.0	93.6	92.3	50.0	95.2	100.0	97.5
CARTS	14.0	6.4	23.1	37.5	19.0	5.9	10.0
OTHER	-	-	-	-	-	-	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 29
RESULT OF LAST PHYSICAL INVENTORY IN DRY GROCERY DISTRIBUTION CENTER

				1985 SALES (MILLIONS OF DOLLARS)			
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 101	101-250	251-500	OVER 500
DOLLAR VALUE							
TOTAL	81	44	37	9	22	13	37
GAIN	82.7	84.1	81.1	88.9	86.4	84.6	78.4
LOSS	17.3	15.9	18.9	11.1	13.6	15.4	21.6
CASE COUNT							
TOTAL	74	40	34	7	18	14	35
GAIN	86.5	87.5	85.3	85.7	88.9	85.7	85.7
LOSS	13.5	12.5	14.7	14.3	11.1	14.3	14.3

TABLE 30
FORMAL SUPERVISOR TRAINING PROGRAMS IN DRY GROCERY DISTRIBUTION CENTERS **

				1985 SALES (MILLIONS OF DOLLARS)			
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 101	101-250	251-500	OVER 500
TOTAL	88	50	38	9	21	17	41
HAVE PROGRAM FOR NEW SUPERVISORS	53.4	46.0	63.2	22.2	57.1	41.2	63.4
HAVE PROGRAM FOR EXISTING SUPERVISORS	48.9	48.0	50.0	33.3	33.3	41.2	63.4
NO PROGRAMS	35.2	40.0	28.9	66.7	38.1	47.1	22.0

TABLE 31
PERCENTAGE OF COMPANIES USING FOLLOWING METHODS FOR RESERVE SLOT LOCATION CONTROL IN DRY GROCERY CENTERS **

				1985 SALES (MILLIONS OF DOLLARS)			
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 101	101-250	251-500	OVER 500
TOTAL	87	48	39	8	21	17	41
MANUAL BY FORK LIFT	66.7	68.8	64.1	87.5	81.0	64.7	56.1
CARD OR PALLET TAG	32.2	22.9	43.6	37.5	23.8	35.3	34.1
COMPUTER CONTROL	43.7	39.6	48.7	37.5	19.0	35.3	61.0

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

WHOLESALE OPERATIONS

TABLE 32
INDUSTRIAL ENGINEERED DEVELOPED LABOR STANDARDS IN DRY GROCERY DISTRIBUTION CENTERS

				1985 SALES (MILLIONS OF DOLLARS)			
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 101	101-250	251-500	OVER 500
TOTAL	90	49	41	9	22	17	42
HAVE STANDARDS	51.1	40.8	63.4	22.2	27.3	58.8	66.7
DO NOT HAVE STANDARDS	48.9	59.2	36.6	77.8	72.7	41.2	33.3

TABLE 33
USE OF INDUSTRIAL ENGINEERED DEVELOPED LABOR STANDARDS IN DRY GROCERY DISTRIBUTION CENTERS **

				1985 SALES (MILLIONS OF DOLLARS)			
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 101	101-250	251-500	OVER 500
TOTAL	46	20	26	2	6	10	28
TRACK INDIVIDUAL PRODUCTIVITY	97.8	95.0	100.0		100.0	90.0	100.0
TRACK SHIFT PRODUCTIVITY	91.3	85.0	96.2		100.0	90.0	89.3
PLAN SHIFTS	82.6	75.0	88.5		83.3	70.0	85.7
TRACK AREA PRODUCTIVITY	69.6	60.0	76.9		83.3	50.0	71.4

** MULTIPLE RESPONSES ACCEPTED

GM/HABA DISTRIBUTION CENTER OPERATIONS

TABLE 34
TYPICAL NUMBER OF SHIPPED CASES PER WEEK IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	75,733	26,000	284,600	61
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	15,930	3,850	61,500	8
10,000 TO 49,999	52,500	20,750	126,500	24
50,000 TO 99,999	139,000	52,000	350,000	15
OVER 100,000	214,135	85,000	616,206	14

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 35
TYPICAL NUMBER OF SUPERMARKETS SERVED PER HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	84	54	177	63
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	54	34	105	7
10,000 TO 49,999	57	39	104	25
50,000 TO 99,999	100	73	235	15
OVER 100,000	146	73	326	16

TABLE 36
TYPICAL NUMBER OF ITEMS AVAILABLE IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION ALL CENTERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	3,663	2,159	6,650	60
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	2,159	1,286	2,800	8
10,000 TO 49,999	2,373	1,700	3,590	23
50,000 TO 99,999	4,615	3,265	6,500	14
OVER 100,000	9,000	6,300	13,950	15

TABLE 37
TYPICAL NUMBER OF ITEMS AVAILABLE IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION RETAIL CENTERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	3,903	2,224	6,800	37
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	1,550	795	2,159	4
10,000 TO 49,999	2,387	1,700	3,300	14
50,000 TO 99,999	4,800	3,584	6,364	8
OVER 100,000	8,500	6,300	13,950	11

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 38

TYPICAL NUMBER OF ITEMS AVAILABLE IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION WHOLESALE CENTERS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	3,400	2,000	6,500	23
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	2,800	1,911	3,900	4
10,000 TO 49,999	2,100	1,848	3,590	9
50,000 TO 99,999	4,615	3,200	6,500	6
OVER 100,000	10,500	5,300	13,800	4

TABLE 39

TYPICAL NUMBER OF INBOUND TRUCK LOADS PER WEEK -- HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	41	21	83	52
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	5	5	13	5
10,000 TO 49,999	25	10	50	17
50,000 TO 99,999	51	30	80	14
OVER 100,000	110	48	153	16

TABLE 40

TYPICAL TOTAL AREA IN SQUARE FEET OF THE HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	44,950	18,000	95,000	66
RETAIL CENTERS	60,000	20,000	122,500	40
WHOLESALE CENTERS	31,500	10,002	87,500	26

TABLE 41

TYPE OF SELECTION METHOD IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

		SIZE OF HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION			
	ALL CENTERS	LESS THAN 10,000	10,000 TO 49,999	50,000 TO 99,999	100,000 OR MORE
ALL CENTERS	60	9	21	15	15
FROM SHELVING	50.0	100.0	47.6	46.7	26.7
FROM FLOW RACK	48.3	-	52.4	53.3	66.7
FROM CAROUSEL	1.7	-	-	-	6.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 42
TYPICAL NUMBER OF EMPLOYEES IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	21	8	57	66
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	3	2	5	9
10,000 TO 49,999	12	7	17	26
50,000 TO 99,999	34	23	56	15
OVER 100,000	83	60	98	16

TABLE 43
TYPICAL NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK -- HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	32	22	54	38
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000 TO 49,999	30	20	60	13
50,000 TO 99,999	29	19	47	8
OVER 100,000	50	25	100	15

TABLE 44
TYPICAL NUMBER OF INVENTORY TURNS IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	9	7	12	52
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	11	8	14	6
10,000 TO 49,999	12	10	18	18
50,000 TO 99,999	8	6	9	13
OVER 100,000	8	6	9	15

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 45
CURRENT SCRATCH RATE IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	3.0	.7	4.5	49
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000 TO 49,999	3.4	.8	4.5	18
50,000 TO 99,999	1.0	.5	4.3	13
OVER 100,000	3.0	1.1	5.0	15

TABLE 46
TYPICAL NUMBER OF UNITS RECEIVED PER DIRECT LABOR HOUR PER WEEK IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	980	494	1910	40
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000 TO 49,999	500	340	1866	13
50,000 TO 99,999	1207	887	3552	10
OVER 100,000	1061	650	2338	15

TABLE 47
TYPICAL NUMBER OF UNITS STORED AND REPLENISHED PER DIRECT LABOR HOUR IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	482	335	1061	41
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000 TO 49,999	369	300	1620	14
50,000 TO 99,999	481	355	1800	10
OVER 100,000	834	360	1061	14

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 48
TYPICAL NUMBER OF UNITS SELECTED PER DIRECT LABOR HOUR IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	270	185	475	55
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	290	150	350	5
10,000 TO 49,999	217	175	498	23
50,000 TO 99,999	227	180	450	13
OVER 100,000	336	232	498	14

TABLE 49
TYPICAL NUMBER OF UNITS SHIPPED PER DIRECT LABOR HOUR IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL CENTERS	476	190	2137	39
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000 TO 49,999	572	190	2137	11
50,000 TO 99,999	348	159	1293	12
OVER 100,000	519	210	2311	13

TABLE 50
TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK IN WHOLESALE HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL WHOLESALE CENTERS	358	180	520	21
COMPANY SALES (IN MILLIONS OF DOLLARS)				
101-250	258	198	403	4
OVER 250	423	165	613	16

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 51

TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL RETAIL CENTERS	137	78	208	40
COMPANY SALES (IN MILLIONS OF DOLLARS)				
101-250	40	40	50	5
251-500	89	73	125	11
OVER 500	197	126	250	22

TABLE 52

TYPICAL NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL RETAIL CENTERS	137	78	208	40
SELECTION FROM SHELVING	101	52	158	20
SELECTION FROM FLOW RACK	160	112	350	18
SELECTION FROM CAROUSEL				1

TABLE 53

SHIFTS PER WEEK, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN HABA/GENERAL MERCHANDISE DISTRIBUTION CENTER/SECTION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	64	39	25
SHIFTS PER WEEK			
FOUR	4.7	5.1	4.0
FIVE TO SEVEN	54.7	59.0	48.0
EIGHT TO FOURTEEN	28.1	28.2	28.0
FIFTEEN TO TWENTY	7.8	5.1	12.0
TWENTY-ONE OR MORE	4.7	2.6	8.0
ALL CENTERS	65	40	25
DAYS OF OPERATION PER WEEK			
FOUR	4.6	5.0	4.0
FIVE	69.2	75.0	60.0
SIX	18.5	17.5	20.0
SEVEN	7.7	2.5	16.0
ALL CENTERS	65	40	25
EMPLOYEES UNIONIZED			
YES	67.7	67.5	68.0
NO	32.3	32.5	32.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 54
TYPICAL PERCENTAGE OF OPERATIONS SUPPLIED BY OUTSIDE WHOLESALERS AND DIRECT VENDOR DELIVERIES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	100.0	50.0	100.0	230
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	100.0	100.0	100.0	65
10 - 30	100.0	100.0	100.0	44
31 - 100	100.0	86.2	100.0	48
101 - 250	85.0	32.0	100.0	29
251 - 500	27.5	20.0	90.0	18
OVER 500	22.0	18.0	30.0	26
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	100.0	34.0	100.0	16
MIDDLE ATLANTIC	100.0	32.5	100.0	24
EAST NORTH CENTRAL	100.0	45.0	100.0	67
WEST NORTH CENTRAL	100.0	80.0	100.0	23
SOUTHEAST	100.0	57.5	100.0	40
WEST SOUTH CENTRAL	100.0	50.0	100.0	17
MOUNTAIN	100.0	57.5	100.0	12
PACIFIC	100.0	76.5	100.0	28
CANADA				3
RETAIL AFFILIATION				
CHAIN	35.0	22.0	100.0	87
INDEPENDENT	100.0	100.0	100.0	143

TABLE 55
NUMBER OF SUPERMARKETS COMPANY OPERATES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	246	17	25	72	24	44	18	12	30	4
1	26.0	29.4	16.0	36.1	37.5	25.0	5.6	25.0	16.7	-
2-10	35.8	23.5	28.0	38.9	29.2	40.9	33.3	41.7	40.0	25.0
11-49	25.2	35.3	36.0	16.7	25.0	20.5	44.4	16.7	33.3	-
50 AND OVER	13.0	11.8	20.0	8.3	8.3	13.6	16.7	16.7	10.0	75.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 56A
PERCENTAGE OF OPERATION SUPPLIED BY

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	230	16	24	67	23	40	17	12	28	3
OWN WAREHOUSE	63.9	73.9	62.9	66.9	44.5	73.3	56.6	52.0	53.4	
VOLUNTARY WHOLESALER	4.5	.4	7.7	2.0	10.4	1.9	6.4	11.2	5.7	
COOPERATIVE WHOLESALER	4.4	6.5	1.9	3.1	9.0	3.5	4.2	3.5	13.2	
UNAFFILIATED WHOLESALER	2.2	.3	6.7	1.4	.9	.9	5.0	1.3	2.6	
DIRECT VENDOR DELIVERIES	25.0	18.9	20.8	26.6	35.2	20.3	27.8	32.0	25.1	

NOTE: DATA WEIGHTED BY 1985 SALES

TABLE 56B
PERCENTAGE OF OPERATION SUPPLIED BY

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	230	87	143	65	44	48	29	18	26
OWN WAREHOUSE	63.9	66.5	14.4	3.6	4.1	18.3	27.6	54.7	72.7
VOLUNTARY WHOLESALER	4.5	3.6	22.0	35.4	35.8	19.7	8.4	10.1	1.8
COOPERATIVE WHOLESALER	4.4	3.5	21.9	24.3	15.9	18.8	23.7	5.9	1.2
UNAFFILIATED WHOLESALER	2.2	1.7	10.8	8.4	14.9	10.0	8.2	7.6	.1
DIRECT VENDOR DELIVERIES	25.0	24.7	30.9	28.4	29.4	33.3	32.0	21.8	24.2

NOTE: DATA WEIGHTED BY 1985 SALES

TABLE 57
RETAIL SALES IN 1985

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	246	17	25	72	24	44	18	12	30	4
UNDER 10 MILLION	27.2	29.4	16.0	31.9	41.7	27.3	5.6	33.3	26.7	-
10 - 30 MILLION	19.5	17.6	20.0	23.6	20.8	18.2	22.2	25.0	6.7	25.0
31 - 100 MILLION	20.7	17.6	16.0	20.8	12.5	22.7	33.3	-	33.3	-
101 - 250 MILLION	13.0	-	16.0	12.5	12.5	13.6	16.7	8.3	20.0	-
251 - 500 MILLION	8.1	11.8	16.0	5.6	4.2	6.8	11.1	16.7	3.3	25.0
OVER 500 MILLION	11.4	23.5	16.0	5.6	8.3	11.4	11.1	16.7	10.0	50.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 58

TYPICAL PERCENT CHANGE IN RETAIL SALES 1984 VS. 1985

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	5.0	1.2	11.0	238
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	4.2	.0	10.7	66
10 - 30	4.3	.0	11.1	47
31 - 100	4.3	1.0	7.7	50
101 - 250	5.0	2.1	12.0	28
251 - 500	6.8	2.3	20.8	19
OVER 500	7.6	4.0	9.6	28
REGION - CHAIN STORES				
NORTHEAST	9.1	1.2	11.9	7
MIDDLE ATLANTIC	4.8	3.0	9.1	13
EAST NORTH CENTRAL	4.8	2.2	9.1	18
WEST NORTH CENTRAL	6.2	4.1	7.1	7
SOUTHEAST	7.7	4.2	15.9	15
WEST SOUTH CENTRAL	5.9	2.3	8.8	9
MOUNTAIN	7.6	6.3	15.2	4
PACIFIC	4.0	2.1	13.7	11
CANADA				3
REGION - INDEPENDENT STORES				
NORTHEAST	3.2	.0	7.9	9
MIDDLE ATLANTIC	.0	-8.9	5.6	11
EAST NORTH CENTRAL	3.3	.0	9.0	53
WEST NORTH CENTRAL	4.2	.0	16.1	16
SOUTHEAST	4.2	.4	11.0	29
WEST SOUTH CENTRAL	6.8	.8	15.6	8
MOUNTAIN	4.9	-.3	9.5	7
PACIFIC	5.6	1.3	8.0	17
CANADA				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 59
TYPICAL PERCENT CHANGE IN RETAIL SALES IDENTICAL STORES 1984 VS. 1985 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.6	.0	7.7	183
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	3.4	-1.2	10.9	36
10 - 30	3.2	.0	8.9	36
31 - 100	3.8	.9	6.2	49
101 - 250	3.8	1.5	8.0	25
251 - 500	4.2	-.3	8.9	16
OVER 500	4.5	2.0	5.4	21
REGION - CHAIN STORES				
NORTHEAST	5.4	1.2	5.9	5
MIDDLE ATLANTIC	4.9	-.2	6.6	10
EAST NORTH CENTRAL	5.0	1.9	8.3	13
WEST NORTH CENTRAL	2.8	2.0	4.2	7
SOUTHEAST	3.3	1.0	4.9	14
WEST SOUTH CENTRAL	2.6	1.3	5.5	7
MOUNTAIN	5.4	4.3	6.5	4
PACIFIC	4.7	1.7	11.6	11
CANADA				3
REGION - INDEPENDENT STORES				
NORTHEAST	2.2	.0	3.2	5
MIDDLE ATLANTIC	.0	-8.9	7.1	7
EAST NORTH CENTRAL	2.6	.0	8.3	39
WEST NORTH CENTRAL	-.6	-7.6	9.4	8
SOUTHEAST	3.8	.4	7.7	23
WEST SOUTH CENTRAL	3.6	.0	9.6	8
MOUNTAIN	8.3	-.3	16.7	6
PACIFIC	2.6	1.0	5.8	13
CANADA				0

** INCLUDES ONLY THOSE STORES OPEN DURING ENTIRE TWO-YEAR PERIOD OF 1984-1985

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 60
TYPICAL WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1985

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	206,543	145,000	228,491	6197
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	77,000	63,000	100,000	86
10 - 30	114,926	75,000	175,000	127
31 - 100	104,900	78,000	151,610	425
101 - 250	117,650	96,000	191,500	583
251 - 500	145,000	114,000	230,000	734
OVER 500	207,500	174,200	235,600	4242
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	301,000	200,300	400,340	319
MIDDLE ATLANTIC	164,933	132,653	314,903	646
EAST NORTH CENTRAL	206,400	182,584	210,000	1824
WEST NORTH CENTRAL	152,834	118,000	235,000	297
SOUTHEAST	157,625	125,601	228,491	1184
WEST SOUTH CENTRAL	255,295	105,000	261,740	361
MOUNTAIN	217,600	216,510	221,980	587
PACIFIC	183,585	145,000	275,409	438
CANADA	152,340	149,330	153,100	541
RETAIL AFFILIATION				
CHAIN	208,600	148,500	231,910	5739
INDEPENDENT	126,202	79,800	183,585	458

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 61A
PROFILE BY STORE TYPE --NUMBER OF STORES RESPONDING TO EACH ITEM

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
TYPICAL WEEKLY SALES	2591	1686	765	185
TYPICAL WEEKLY SALES/CHECKOUT	2311	1563	664	176
TYPICAL SALE/ CUSTOMER TRANSACTION	2548	1655	738	151
SALES/LABOR HOUR	2295	1520	642	168
TYPICAL WEEKLY SALES/SQUARE FOOT OF SELLING AREA	2491	1536	751	174
TYPICAL TOTAL SIZE/SQUARE FEET	2584	1701	765	186
TYPICAL SELLING SIZE/SQUARE FEET	2513	1660	749	185
TYPICAL RETAIL PRICE/ITEM	1604	1216	587	101
TYPICAL NUMBER OF ITEMS CARRIED	2033	1303	681	168

NOTE: UNWEIGHTED DATA

TABLE 61B
PROFILE BY STORE TYPE --MEDIANS

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
TYPICAL WEEKLY SALES	137,983	230,000	270,026	150,000
TYPICAL WEEKLY SALES/CHECKOUT	19,300	24,240	27,003	25,497
TYPICAL SALE/ CUSTOMER TRANSACTION	14.00	16.31	17.31	22.00
SALES/LABOR HOUR	85.00	87.50	88.76	135.03
TYPICAL WEEKLY SALES/SQUARE FOOT OF SELLING AREA	8.48	8.67	8.40	5.90
TYPICAL TOTAL SIZE/SQUARE FEET	22,500	33,000	46,056	28,300
TYPICAL SELLING SIZE/SQUARE FEET	16,875	24,274	34,171	24,000
TYPICAL RETAIL PRICE/ITEM	1.30	1.32	1.35	1.13
TYPICAL NUMBER OF ITEMS CARRIED	13,800	22,500	32,750	10,000

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 62

TYPICAL WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	8.43	7.18	9.83	5478
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	7.24	5.73	10.21	84
10 - 30	7.80	6.00	9.89	118
31 - 100	6.25	5.11	9.34	405
101 - 250	8.12	6.22	10.29	502
251 - 500	5.96	5.00	6.73	675
OVER 500	8.47	8.00	10.23	3694
REGION - CHAIN STORES				
NORTHEAST	13.47	11.76	16.05	283
MIDDLE ATLANTIC	11.22	10.23	15.87	480
EAST NORTH CENTRAL	8.42	8.40	8.45	1550
WEST NORTH CENTRAL	7.19	7.17	7.50	270
SOUTHEAST	7.18	7.03	8.00	1069
WEST SOUTH CENTRAL	9.83	6.25	9.85	309
MOUNTAIN	8.88	8.85	8.90	549
PACIFIC	10.30	9.22	11.52	358
CANADA	6.44	6.42	7.91	173
REGION - INDEPENDENT STORES				
NORTHEAST	15.36	10.21	16.00	15
MIDDLE ATLANTIC	11.93	8.45	13.86	23
EAST NORTH CENTRAL	9.02	5.79	10.82	151
WEST NORTH CENTRAL	6.84	5.73	11.62	27
SOUTHEAST	6.65	6.00	8.00	115
WEST SOUTH CENTRAL	6.25	5.83	7.49	32
MOUNTAIN	9.26	9.25	9.70	16
PACIFIC	11.56	8.56	14.50	55
CANADA				3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 63
TYPICAL SALE (IN DOLLARS) PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	16.33	14.80	17.12	6152
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	12.11	10.00	13.50	81
10 - 30	14.00	10.50	17.19	110
31 - 100	13.80	12.00	16.11	441
101 - 250	14.23	12.00	17.76	633
251 - 500	15.69	13.14	18.15	700
OVER 500	16.42	15.70	16.50	4187
REGION - CHAIN STORES				
NORTHEAST	19.00	18.90	21.33	304
MIDDLE ATLANTIC	15.79	15.29	22.50	620
EAST NORTH CENTRAL	16.35	16.34	16.37	1659
WEST NORTH CENTRAL	14.62	14.60	19.27	270
SOUTHEAST	15.06	14.80	16.90	1035
WEST SOUTH CENTRAL	14.24	14.20	15.00	337
MOUNTAIN	15.70	15.69	15.74	571
PACIFIC	15.00	13.60	18.20	382
CANADA	16.33	13.61	16.35	538
REGION - INDEPENDENT STORES				
NORTHEAST	16.61	13.46	19.00	14
MIDDLE ATLANTIC	16.30	15.50	19.00	22
EAST NORTH CENTRAL	12.77	11.67	16.11	164
WEST NORTH CENTRAL	12.11	10.50	13.00	27
SOUTHEAST	12.51	10.50	13.83	108
WEST SOUTH CENTRAL	17.00	12.50	22.00	28
MOUNTAIN	17.58	10.96	19.75	14
PACIFIC	14.00	13.80	20.00	56
CANADA				3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 64
TYPICAL WEEKLY SALES (IN DOLLARS) PER CHECKOUT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	25,818	19,600	26,350	5225
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	15,000	12,500	18,250	85
10 - 30	15,000	12,500	19,600	110
31 - 100	18,029	15,591	22,075	335
101 - 250	19,000	16,467	23,000	487
251 - 500	20,700	14,000	26,000	634
OVER 500	25,560	21,780	26,770	3574
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	23,136	23,135	33,360	253
MIDDLE ATLANTIC	23,000	20,681	33,100	531
EAST NORTH CENTRAL	26,080	25,559	26,200	1659
WEST NORTH CENTRAL	19,000	17,011	24,097	297
SOUTHEAST	20,000	17,000	22,000	1107
WEST SOUTH CENTRAL	26,500	16,467	26,510	276
MOUNTAIN	26,480	26,086	26,610	585
PACIFIC	29,428	19,600	29,720	341
CANADA	13,920	13,918	17,622	176
RETAIL AFFILIATION				
CHAIN	25,825	20,586	26,370	4815
INDEPENDENT	18,500	14,400	23,741	410

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 55
TYPICAL SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	88.00	83.58	99.60	5447
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	75.00	69.67	91.72	69
10 - 30	80.00	75.00	95.00	103
31 - 100	88.00	75.30	101.63	363
101 - 250	89.95	66.98	96.72	541
251 - 500	84.47	80.00	97.63	647
OVER 500	88.90	87.85	99.65	3724
REGION - CHAIN STORES				
NORTHEAST	95.00	90.07	96.65	283
MIDDLE ATLANTIC	95.00	86.97	113.30	460
EAST NORTH CENTRAL	87.42	87.40	87.44	1659
WEST NORTH CENTRAL	93.00	91.21	96.50	247
SOUTHEAST	83.58	80.50	90.00	1035
WEST SOUTH CENTRAL	82.28	81.86	83.47	233
MOUNTAIN	99.60	99.59	99.62	571
PACIFIC	130.00	121.39	130.29	382
CANADA	84.50	84.47	88.16	173
REGION - INDEPENDENT STORES				
NORTHEAST	85.00	73.50	90.00	12
MIDDLE ATLANTIC	103.44	72.94	112.00	20
EAST NORTH CENTRAL	79.80	67.50	90.36	156
WEST NORTH CENTRAL	82.45	75.00	99.00	27
SOUTHEAST	75.00	72.00	93.00	97
WEST SOUTH CENTRAL	75.00	70.00	80.00	25
MOUNTAIN	77.25	77.23	81.00	13
PACIFIC	110.43	100.33	120.00	51
CANADA				3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 66
TOTAL SIZE (IN SQUARE FEET) OF TYPICAL SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	33,600	25,000	36,606	6176
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	14,545	11,300	20,000	86
10 - 30	21,500	18,000	28,000	127
31 - 100	19,000	15,000	25,000	436
101 - 250	25,000	20,000	30,000	649
251 - 500	31,450	22,000	38,000	734
OVER 500	33,579	32,000	37,553	4144
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	35,000	32,000	42,600	319
MIDDLE ATLANTIC	25,000	20,000	48,764	548
EAST NORTH CENTRAL	33,582	33,239	33,584	1819
WEST NORTH CENTRAL	28,000	16,500	42,000	297
SOUTHEAST	37,553	22,500	38,000	1184
WEST SOUTH CENTRAL	30,000	24,500	33,384	427
MOUNTAIN	36,510	36,500	36,512	587
PACIFIC	32,000	22,500	36,040	454
CANADA	27,740	27,738	27,742	541
RETAIL AFFILIATION				
CHAIN	33,570	27,738	36,500	5723
INDEPENDENT	21,000	16,000	28,000	453

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 67
TOTAL SELLING AREA (IN SQUARE FEET) OF TYPICAL SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	24,333	18,500	26,956	5771
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	11,000	8,500	15,000	85
10 - 30	15,750	13,000	20,000	127
31 - 100	15,000	12,000	18,500	430
101 - 250	17,950	16,000	21,100	638
251 - 500	20,300	16,342	30,000	712
OVER 500	24,744	24,000	26,950	3779
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	25,000	20,000	31,800	319
MIDDLE ATLANTIC	19,000	15,000	33,500	548
EAST NORTH CENTRAL	24,867	24,740	24,991	1808
WEST NORTH CENTRAL	18,500	13,500	31,000	297
SOUTHEAST	26,956	16,875	30,000	1177
WEST SOUTH CENTRAL	24,000	19,600	26,239	427
MOUNTAIN	24,335	24,330	24,340	565
PACIFIC	23,909	18,000	24,149	454
CANADA	12,656	12,650	20,484	176
RETAIL AFFILIATION				
CHAIN	24,744	19,500	26,956	5325
INDEPENDENT	16,000	12,660	21,000	446

TABLE 68A
AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5119	311	527	1773	294	923	172	559	387	173
NUMBER OF ITEMS	17,459	20,096	17,213	18,514	17,207	17,948	16,553	17,489	13,248	10,698

TABLE 68B
AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5119	4788	331	53	63	315	524	678	3486
NUMBER OF ITEMS	17,459	17,574	15,798	12,318	14,294	15,119	13,533	14,482	18,975

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 69A
AVERAGE PRICE (IN DOLLARS) OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	4086	227	397	1493	114	609	235	559	279	173
PRICE OF ITEMS	1.31	1.20	1.24	1.32	1.23	1.29	1.36	1.50	1.21	1.19

NOTE: DATA WEIGHTED BY NUMBER OF STORES

TABLE 69B
AVERAGE PRICE (IN DOLLARS) OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	4086	3876	210	28	52	196	345	456	3009
PRICE OF ITEMS	1.31	1.31	1.32	1.30	1.27	1.29	1.23	1.21	1.34

NOTE: DATA WEIGHTED BY NUMBER OF STORES

TABLE 70A
CREDIT CARDS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5986	358	643	1825	295	1183	427	590	489	176
PERCENTAGE OF STORES THAT ACCEPT CREDIT CARDS FOR GROCERY ITEMS	13.3	.6	17.3	23.3	.3	3.0	19.7	16.6	7.6	-
TOTAL	5968	358	643	1822	280	1183	427	590	489	176
PERCENTAGE OF STORES THAT ACCEPT CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS	27.3	19.8	32.3	31.7	19.6	16.3	31.4	51.5	17.6	1.7

TABLE 70B
CREDIT CARDS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5986	5530	456	80	131	452	673	773	3877
PERCENTAGE OF STORES THAT ACCEPT CREDIT CARDS FOR GROCERY ITEMS	13.3	13.3	12.9	15.0	11.5	6.0	12.0	.8	16.8
TOTAL	5968	5519	449	80	128	437	673	773	3877
PERCENTAGE OF STORES THAT ACCEPT CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS	27.3	28.1	17.8	16.3	14.1	9.4	19.2	15.7	33.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 71
PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.0	2.5	8.3	140
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	2.0	1.2	4.0	38
10 - 30	2.0	1.0	3.5	28
31 - 100	2.0	1.5	3.3	26
101 - 250	2.9	2.0	6.0	17
251 - 500	3.4	3.0	5.0	13
OVER 500	4.5	2.5	8.8	18
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	3.7	3.0	3.7	13
MIDDLE ATLANTIC	5.2	2.5	5.2	15
EAST NORTH CENTRAL	3.3	2.5	3.5	39
WEST NORTH CENTRAL	4.5	3.0	4.6	16
SOUTHEAST	2.1	2.0	3.0	26
WEST SOUTH CENTRAL	5.0	4.5	16.1	8
MOUNTAIN	10.0	5.4	10.1	6
PACIFIC	2.0	1.0	2.5	16
CANADA				1
RETAIL AFFILIATION				
CHAIN	4.5	2.5	8.7	52
INDEPENDENT	2.0	1.5	3.3	88

NOTE: DATA WEIGHTED BY 1985 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 72

PERCENTAGE OF SALES ACCOUNTED FOR BY HEALTH AND BEAUTY AIDS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4.0	3.1	7.0	140
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	2.7	2.0	3.5	39
10 - 30	3.0	2.0	3.5	27
31 - 100	2.2	1.9	3.0	28
101 - 250	3.0	2.7	3.6	17
251 - 500	3.7	3.2	4.4	12
OVER 500	4.7	3.0	7.0	17
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	4.0	2.0	5.1	14
MIDDLE ATLANTIC	7.6	3.5	7.7	16
EAST NORTH CENTRAL	3.4	3.0	3.5	40
WEST NORTH CENTRAL	4.7	2.0	4.7	13
SOUTHEAST	3.1	3.0	3.5	28
WEST SOUTH CENTRAL	8.0	4.9	8.1	5
MOUNTAIN	7.0	6.4	7.1	6
PACIFIC	2.5	.5	3.0	17
CANADA				1
RETAIL AFFILIATION				
CHAIN	4.0	3.2	7.2	50
INDEPENDENT	2.5	2.1	3.1	90

NOTE: DATA WEIGHTED BY 1985 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 73

PERCENTAGE OF SALES ACCOUNTED FOR BY TOBACCO

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	2.5	2.0	3.5	124
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	3.0	2.0	4.8	32
10 - 30	4.0	2.0	4.8	27
31 - 100	2.9	2.1	5.0	26
101 - 250	3.0	2.0	4.0	16
251 - 500	3.0	2.0	4.0	9
OVER 500	2.5	2.1	3.0	14
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	2.0	1.0	2.5	14
MIDDLE ATLANTIC	1.1	1.0	2.0	14
EAST NORTH CENTRAL	3.0	2.1	4.0	30
WEST NORTH CENTRAL	3.5	2.7	3.5	15
SOUTHEAST	2.5	2.5	4.0	26
WEST SOUTH CENTRAL	3.1	3.0	4.0	5
MOUNTAIN	3.0	2.9	3.1	4
PACIFIC	1.6	1.5	5.0	15
CANADA				1
RETAIL AFFILIATION				
CHAIN	2.4	2.1	3.5	43
INDEPENDENT	2.1	1.6	4.8	81

NOTE: DATA WEIGHTED BY 1985 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 74A
SPECIALTY DEPARTMENTS AND SERVICES OFFERED BY SUPERMARKETS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5491	358	517	1801	188	1071	357	587	439	173
BEER	80.3	55.0	51.6	95.2	77.1	77.0	79.0	92.3	99.5	-
DELI WITH CARRY-OUT	68.1	90.2	62.9	80.0	57.4	63.7	42.9	68.1	44.0	66.5
COURTESY BOOTH	67.2	86.6	85.5	85.3	67.0	47.8	87.1	47.5	22.3	42.8
SCRATCH AND/OR BAKE-OFF BAKERY	62.5	65.6	63.8	79.1	43.6	48.1	49.6	81.9	25.7	41.6
WINE	59.6	31.8	1.7	64.9	54.3	72.3	67.2	72.7	99.5	-
FLORAL/PLANT SHOP	56.5	55.6	39.1	58.9	47.3	40.5	40.9	96.1	73.1	49.7
PHOTOGRAPHIC SERVICE CENTER	45.2	63.4	47.8	43.3	36.7	51.6	59.1	47.2	27.3	-
FRESH SEAFOOD	39.0	84.9	27.5	43.8	44.7	19.8	25.2	39.0	43.1	57.8
READING CENTER	35.3	11.2	26.7	21.4	36.7	52.3	49.3	76.8	26.4	-
SERVICE MEAT	30.6	41.3	34.4	28.0	18.6	49.7	21.8	25.4	9.1	8.7
VIDEO RENTAL	28.8	17.6	23.8	27.4	35.1	33.2	42.3	49.2	7.7	3.5
COSMETIC CENTER	24.3	10.9	22.1	26.7	19.1	20.1	62.7	20.4	24.8	-
CATERING	23.7	1.7	10.6	55.3	4.3	3.5	5.9	3.4	9.6	66.5
PHARMACY	23.1	5.6	25.9	26.0	36.2	12.5	32.5	41.6	18.5	1.7
LIQUOR	14.8	2.0	1.2	9.9	39.9	.4	7.8	43.6	58.3	-
SALAD BAR	13.2	48.3	19.3	6.6	9.6	17.6	9.0	3.6	3.9	33.5
RESTAURANT	11.2	1.4	.4	21.8	17.6	3.8	20.4	4.4	7.1	5.2
LUNCH COUNTER/SNACK BAR	10.6	2.8	3.5	7.4	12.8	4.0	42.9	7.3	22.8	34.7
DELIVERY SERVICE	1.5	.3	2.3	1.8	11.7	.3	2.0	1.2	-	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 74B
SPECIALTY DEPARTMENTS AND SERVICES OFFERED BY SUPERMARKETS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5491	5044	447	83	119	410	564	634	3681
BEER	80.3	81.1	71.1	72.3	64.7	68.0	81.2	53.3	86.9
DELI WITH CARRY-OUT	68.1	68.5	64.2	63.9	76.5	50.2	43.6	58.5	75.3
COURTESY BOOTH	67.2	67.8	59.5	62.7	67.2	48.3	44.0	51.3	75.7
SCRATCH AND/OR BAKE-OFF BAKERY	62.5	63.2	54.1	48.2	58.8	42.9	41.1	71.0	66.9
WINE	59.6	60.0	54.6	57.8	45.4	52.7	64.7	43.8	62.8
FLORAL/PLANT SHOP	56.5	59.2	26.4	20.5	33.6	18.0	39.2	50.0	66.1
PHOTOGRAPHIC SERVICE CENTER	45.2	44.5	53.9	37.3	49.6	43.4	23.4	39.7	49.8
FRESH SEAFOOD	39.0	38.0	49.7	44.6	49.6	47.1	50.9	54.1	33.1
READING CENTER	35.3	34.4	44.7	41.0	42.0	41.5	29.1	27.8	36.5
SERVICE MEAT	30.6	31.0	25.3	24.1	36.1	24.1	16.3	30.4	33.5
VIDEO RENTAL	28.8	29.0	26.2	30.1	26.9	20.2	18.6	16.2	33.5
COSMETIC CENTER	24.3	24.4	23.5	12.0	31.9	24.6	13.7	32.3	24.6
CATERING	23.7	23.4	26.4	24.1	44.5	9.3	8.2	11.7	29.0
PHARMACY	23.1	24.5	7.4	1.2	4.2	4.6	12.8	18.6	28.6
LIQUOR	14.8	14.5	17.9	18.1	14.3	13.4	15.2	16.1	14.6
SALAD BAR	13.2	13.2	13.4	18.1	17.6	6.8	12.1	20.3	12.6
RESTAURANT	11.2	11.7	5.1	6.0	4.2	4.1	2.1	10.6	13.8
LUNCH COUNTER/SNACK BAR	10.6	10.9	8.1	4.8	14.3	5.4	5.0	26.5	9.4
DELIVERY SERVICE	1.5	.9	9.2	22.9	11.8	2.0	1.6	-	.9

TABLE 75A
PERCENTAGE OF TOTAL STORES USING PROMOTIONAL TECHNIQUES IN PAST SIX MONTHS (JUNE - DECEMBER 1985)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5572	321	596	1786	212	1144	420	583	408	102
TRADING STAMPS	9.5	.9	2.9	.2	1.4	35.3	13.6	-	10.5	-
GAMES	10.7	.6	3.9	8.7	14.2	14.2	51.7	.2	1.0	-
CONTINUITY PROGRAMS	58.2	60.7	85.6	27.5	58.0	64.9	83.8	80.1	64.2	97.1
IN-STORE COUPONS	76.8	64.5	90.6	91.1	67.5	65.2	39.5	99.8	66.4	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 75B

PERCENTAGE OF TOTAL STORES USING PROMOTIONAL TECHNIQUES IN PAST SIX MONTHS (JUNE - DECEMBER 1985)

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5572	5154	418	69	116	410	578	692	3707
TRADING STAMPS	9.5	9.6	7.9	8.7	13.8	6.3	21.8	4.2	8.8
GAMES	10.7	10.0	18.7	30.4	27.6	14.4	14.9	5.8	9.6
CONTINUITY PROGRAMS	58.2	58.5	54.8	52.2	75.9	55.1	63.5	75.7	54.0
IN-STORE COUPONS	76.8	77.9	63.4	65.2	63.8	70.2	45.8	61.0	86.0

NOTE: UNWEIGHTED DATA

TABLE 76

TYPICAL SUPERMARKET ADVERTISING COSTS AS A PERCENT OF SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.0	.9	1.2	207
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	1.2	1.0	1.5	56
10 - 30	1.1	.9	1.3	41
31 - 100	1.0	1.0	1.5	44
101 - 250	1.0	.6	1.3	29
251 - 500	1.0	.8	1.2	15
OVER 500	1.0	1.0	1.2	24
REGION - CHAIN STORES				
NORTHEAST	1.0	1.0	1.0	6
MIDDLE ATLANTIC	2.2	1.0	2.2	11
EAST NORTH CENTRAL	1.2	1.2	1.2	17
WEST NORTH CENTRAL	.8	.4	1.4	6
SOUTHEAST	1.0	.9	1.0	13
WEST SOUTH CENTRAL	.9	.9	1.0	7
MOUNTAIN				3
PACIFIC	1.0	.8	1.1	12
CANADA				2
REGION - INDEPENDENT STORES				
NORTHEAST	1.2	1.1	3.0	7
MIDDLE ATLANTIC	2.4	1.8	4.0	9
EAST NORTH CENTRAL	1.0	.9	1.2	45
WEST NORTH CENTRAL	1.6	1.2	1.6	14
SOUTHEAST	1.0	.9	1.2	24
WEST SOUTH CENTRAL	1.0	1.0	1.3	8
MOUNTAIN	.5	.5	.5	5
PACIFIC	1.0	.5	1.8	17
CANADA				1

NOTE: DATA WEIGHTED BY 1985 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 77A
PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	186	12	14	57	17	32	15	8	28	3
NEWSPAPER	60.9	75.0	64.0	54.2	60.0	65.2	54.2	33.3	74.8	
MAILER/FLYER	15.5	5.0	8.5	21.6	.1	14.3	38.3	5.4	4.2	
RADIO	7.7	5.0	4.3	5.2	10.1	7.1	4.0	17.5	11.4	
TELEVISION	6.7	10.0	8.9	7.1	8.4	7.8	1.4	5.8	6.8	
IN-STORE COUPONS	5.2	1.0	11.4	7.5	2.8	3.1	0	37.9	2.3	
BILLBOARDS	.8	0	0	.4	0	1.6	.4	0	.6	
OTHER	3.2	4.0	3.0	4.1	18.6	.9	1.7	0	0	

TABLE 77B
PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	186	70	116	52	33	41	24	13	23
NEWSPAPER	60.9	66.3	54.5	57.8	58.5	59.8	55.3	69.4	64.9
MAILER/FLYER	15.5	9.2	23.2	19.9	23.4	20.3	9.7	14.2	6.7
RADIO	7.7	7.9	7.5	4.3	7.5	8.3	8.9	9.5	7.9
TELEVISION	6.7	10.1	2.6	1.2	2.6	3.1	10.9	4.6	14.5
IN-STORE COUPONS	5.2	2.3	8.8	12.2	3.6	.3	12.1	.8	4.5
BILLBOARDS	.8	.7	.9	1.4	.8	.3	1.7	.3	.4
OTHER	3.2	3.6	2.6	3.2	3.6	7.9	1.3	1.5	1.0

NOTE: DATA WEIGHTED BY ADVERTISING DOLLARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 78A
CURRENT USES OF SCANNING POS DATA ** (PERCENTAGE OF COMPANIES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	173	9	17	55	23	26	15	7	19	2
CHECKER PERFORMANCE	94.2	100.0	94.1	98.2	87.0	92.3	93.3	85.7	94.7	
SPECIALS	78.0	88.9	82.4	85.5	91.3	57.7	66.7	71.4	68.4	
COUPON ACCOUNTING	67.1	66.7	76.5	67.3	82.6	69.2	20.0	71.4	73.7	
WORK SCHEDULING	59.0	55.6	64.7	49.1	65.2	50.0	53.3	71.4	84.2	
MEAT DEPARTMENT ANALYSIS	43.4	55.6	35.3	34.5	52.2	42.3	40.0	57.1	57.9	
NEW PRODUCT EVALUATION	43.4	44.4	58.8	45.5	52.2	23.1	26.7	57.1	47.4	
SHELF ALLOCATION	41.0	55.6	41.2	38.2	69.6	34.6	13.3	42.9	36.8	
PRODUCE DEPARTMENT ANALYSIS	39.9	44.4	35.3	32.7	52.2	34.6	33.3	57.1	52.6	
SHRINK ANALYSIS	28.3	66.7	52.9	18.2	21.7	19.2	40.0	14.3	31.6	
PRICE ELASTICITY	21.4	33.3	17.6	16.4	43.5	15.4	13.3	28.6	21.1	
REORDERING	9.8	11.1	11.8	7.3	13.0	11.5	6.7	14.3	10.5	
OTHER	6.9	11.1	11.8	9.1	4.3	-	6.7	14.3	-	

** MULTIPLE RESPONSE ACCEPTED

TABLE 78B
CURRENT USES OF SCANNING POS DATA ** (PERCENTAGE OF COMPANIES)

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	173	77	96	28	35	43	26	17	24
CHECKER PERFORMANCE	94.2	93.5	94.8	89.3	94.3	100.0	92.3	82.4	100.0
SPECIALS	78.0	71.4	83.3	85.7	88.6	76.7	73.1	76.5	62.5
COUPON ACCOUNTING	67.1	59.7	72.9	64.3	80.0	72.1	65.4	47.1	58.3
WORK SCHEDULING	59.0	59.7	58.3	53.6	60.0	51.2	65.4	52.9	75.0
MEAT DEPARTMENT ANALYSIS	43.4	36.4	49.0	53.6	48.6	46.5	34.6	41.2	29.2
NEW PRODUCT EVALUATION	43.4	31.2	53.1	67.9	51.4	39.5	23.1	29.4	41.7
SHELF ALLOCATION	41.0	36.4	44.8	60.7	48.6	34.9	30.8	29.4	37.5
PRODUCE DEPARTMENT ANALYSIS	39.9	33.8	44.8	57.1	42.9	37.2	26.9	47.1	29.2
SHRINK ANALYSIS	28.3	29.9	27.1	42.9	22.9	25.6	19.2	23.5	37.5
PRICE ELASTICITY	21.4	14.3	27.1	32.1	25.7	23.3	7.7	5.9	25.0
REORDERING	9.8	7.8	11.5	7.1	8.6	14.0	3.8	5.9	16.7
OTHER	6.9	9.1	5.2	7.1	8.6	-	7.7	17.6	8.3

** MULTIPLE RESPONSE ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INSTITUTE SPEAKS, 1986

TABLE 79A
COMPANIES WITH PERSON RESPONSIBLE FOR SCANNING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	174	10	16	56	22	25	15	6	21	3
HAVE PERSON FOR SCANNING	62.6	80.0	81.3	64.3	68.2	52.0	40.0	83.3	52.4	
DON'T HAVE PERSON	37.4	20.0	18.8	35.7	31.8	48.0	60.0	16.7	47.6	

TABLE 79B
COMPANIES WITH PERSON RESPONSIBLE FOR SCANNING

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	174	79	95	28	33	41	28	18	26
HAVE PERSON FOR SCANNING	62.6	50.6	72.6	85.7	75.8	58.5	53.6	55.6	42.3
DON'T HAVE PERSON	37.4	49.4	27.4	14.3	24.2	41.5	46.4	44.4	57.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 80
PERCENTAGE OF COMPANY SALES ACCOUNTED FOR BY THE MEAT DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	18.0	17.5	20.0	9060
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	17.0	15.0	20.0	114
10 - 30	18.0	16.0	19.0	168
31 - 100	18.0	15.6	20.0	509
101 - 250	17.0	15.0	19.0	577
251 - 500	17.0	16.0	19.0	808
OVER 500	18.1	17.6	20.0	6884
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	15.2	15.2	17.0	357
MIDDLE ATLANTIC	17.0	16.0	17.6	885
EAST NORTH CENTRAL	17.5	17.4	17.7	1607
WEST NORTH CENTRAL	17.6	17.0	20.0	408
SOUTHEAST	20.0	18.0	20.2	2583
WEST SOUTH CENTRAL	16.8	16.7	18.0	390
MOUNTAIN	16.1	15.0	16.0	228
PACIFIC	18.0	17.9	18.3	2351
CANADA	18.2	18.0	22.0	251
RETAIL AFFILIATION				
CHAIN	18.0	17.3	20.1	8476
INDEPENDENT	17.0	15.0	19.0	584

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 81

NUMBER OF EMPLOYEES PER STORE IN THE MEAT DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	5	5	7	8398
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	4	3	5	110
10 - 30	4	3	5	166
31 - 100	4	4	6	484
101 - 250	5	3	7	504
251 - 500	5	4	7	784
OVER 500	5	5	7	6350
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	10	6	12	353
MIDDLE ATLANTIC	7	4	9	797
EAST NORTH CENTRAL	7	7	7	1633
WEST NORTH CENTRAL	7	5	7	277
SOUTHEAST	5	5	5	2187
WEST SOUTH CENTRAL	8	4	8	391
MOUNTAIN	5	5	6	201
PACIFIC	5	5	5	2308
CANADA	10	5	10	251
RETAIL AFFILIATION				
CHAIN	5	4	7	7845
INDEPENDENT	5	4	6	553

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 82

WAGES, SALARIES AND FRINGE BENEFITS AS PERCENTAGE OF MEAT DEPARTMENT SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	8	7	11	205
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	10	8	11	58
10 - 30	8	7	9	42
31 - 100	8	7	9	46
101 - 250	9	8	10	20
251 - 500	9	7	11	15
OVER 500	8	7	12	24
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	9	9	10	13
MIDDLE ATLANTIC	9	8	9	28
EAST NORTH CENTRAL	7	7	7	51
WEST NORTH CENTRAL	8	8	9	21
SOUTHEAST	8	7	8	31
WEST SOUTH CENTRAL	9	8	9	20
MOUNTAIN	7	7	9	13
PACIFIC	12	12	12	25
CANADA				3
RETAIL AFFILIATION				
CHAIN	8	7	13	68
INDEPENDENT	8	7	10	137

NOTE: DATA WEIGHTED BY 1985 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 83

TYPICAL POUNDS PER LABOR HOUR FOR MEAT DEPARTMENT EMPLOYEES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	103	96	108	7813
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	85	70	110	34
10 - 30	110	90	150	47
31 - 100	95	85	128	246
101 - 250	120	94	127	376
251 - 500	98	60	125	509
OVER 500	104	98	110	6601
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	131	130	142	288
MIDDLE ATLANTIC	131	110	145	693
EAST NORTH CENTRAL	93	93	93	1505
WEST NORTH CENTRAL	120	77	145	346
SOUTHEAST	100	98	103	2293
WEST SOUTH CENTRAL	104	103	110	227
MOUNTAIN	125	123	135	187
PACIFIC	110	108	111	2136
CANADA	99	96	100	138
RETAIL AFFILIATION				
CHAIN	103	96	108	7585
INDEPENDENT	110	90	130	228

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 84A
PERCENTAGE OF MEAT SALES BY TYPE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9110	332	944	1697	391	2554	365	226	2350	251
BEEF	37.6	39.6	40.8	36.4	39.5	38.2	38.6	43.8	35.3	34.9
PORK	15.3	13.1	16.8	16.0	16.2	12.2	16.0	12.9	18.5	11.6
VEAL	1.4	2.1	2.4	1.2	1.2	1.5	1.1	1.1	1.1	2.2
LAMB	1.7	2.9	1.8	1.2	1.1	2.1	1.3	1.4	1.2	4.5
POULTRY	19.2	20.6	22.5	15.3	15.5	15.8	19.8	14.7	25.2	17.9
FISH AND SEAFOOD	4.3	5.1	3.4	6.4	2.7	3.8	3.0	3.5	4.2	5.3
PROCESSED/FROZEN	16.6	7.9	10.5	21.7	11.1	20.7	18.4	20.2	11.3	25.2
OTHER	4.4	8.7	2.1	2.5	12.5	5.9	2.0	2.8	4.2	.5

TABLE 84B
PERCENTAGE OF MEAT SALES BY TYPE

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9110	8572	538	98	138	454	505	809	7106
BEEF	37.6	37.3	41.1	41.9	39.3	39.5	40.3	39.7	36.9
PORK	15.3	15.1	19.1	20.2	19.7	19.5	16.2	13.9	15.0
VEAL	1.4	1.4	1.8	1.6	1.7	1.3	1.9	1.4	1.4
LAMB	1.7	1.7	1.9	1.7	1.8	1.5	2.3	1.6	1.6
POULTRY	19.2	19.1	19.2	21.0	19.4	19.2	21.4	18.0	19.1
FISH AND SEAFOOD	4.3	4.4	4.6	4.0	4.7	5.1	4.4	4.2	4.3
PROCESSED/FROZEN	16.6	17.1	8.7	6.2	10.5	8.8	10.8	19.5	17.4
OTHER	4.4	4.5	3.7	3.5	3.1	5.1	2.9	2.2	4.8

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 85
TYPICAL NUMBER OF FRESH MEAT ITEMS CARRIED

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	150	135	180	8678
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	100	75	134	92
10 - 30	120	86	170	140
31 - 100	125	110	150	437
101 - 250	150	120	200	398
251 - 500	250	100	400	668
OVER 500	152	140	185	6943
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	147	145	170	354
MIDDLE ATLANTIC	200	175	200	883
EAST NORTH CENTRAL	103	100	120	1599
WEST NORTH CENTRAL	111	110	167	345
SOUTHEAST	180	140	180	2568
WEST SOUTH CENTRAL	200	130	200	371
MOUNTAIN	101	100	193	156
PACIFIC	150	149	152	2151
CANADA	150	149	490	251
RETAIL AFFILIATION				
CHAIN	154	140	182	8182
INDEPENDENT	125	95	175	496

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 86A
PERCENTAGE OF MEAT SALES BONELESS VS. BONE-IN, BY TYPE

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
CHICKEN:										
TOTAL	9219	319	888	1853	408	2552	369	228	2351	251
BONELESS	11.3	15.0	25.2	8.7	8.7	7.1	46.2	33.4	5.7	4.7
BONE-IN	88.8	85.0	75.6	91.3	91.3	92.9	53.8	66.6	94.3	95.3
PORK:										
TOTAL	9246	318	888	1871	407	2552	381	228	2350	251
BONELESS	20.3	31.2	24.4	15.4	22.0	24.3	49.0	16.3	11.5	28.4
BONE-IN	79.7	68.8	75.6	84.6	78.0	75.7	51.0	83.7	88.5	71.6
BEEF:										
TOTAL	9404	319	1022	1873	404	2552	404	228	2351	251
BONELESS	61.0	69.2	67.3	71.7	49.6	66.1	64.2	63.0	46.6	41.2
BONE-IN	39.0	30.8	32.7	28.3	50.4	33.9	35.8	37.0	53.4	58.8

TABLE 86B
PERCENTAGE OF MEAT SALES BONELESS VS. BONE-IN, BY TYPE

	ALL STORES	RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
CHICKEN:									
TOTAL	9219	8649	570	117	162	498	514	669	7259
BONELESS	11.3	11.2	13.5	10.2	9.2	14.9	11.8	6.6	11.5
BONE-IN	88.8	88.9	86.5	89.8	90.8	85.1	88.2	93.4	88.6
PORK:									
TOTAL	9246	8676	570	114	165	498	514	696	7259
BONELESS	20.3	20.2	22.0	17.6	19.5	17.7	18.7	17.1	21.0
BONE-IN	79.7	79.8	78.0	82.4	80.5	82.3	81.3	82.9	79.0
BEEF:									
TOTAL	9404	8828	576	116	168	499	577	785	7259
BONELESS	61.0	61.1	61.9	58.9	61.6	61.3	63.9	63.0	60.6
BONE-IN	39.0	38.9	38.1	41.1	38.4	38.7	36.1	37.0	39.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 87A
PERCENTAGE OF FRESH BEEF SALES BY TYPE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9235	358	1022	1881	408	2583	404	228	2351	0
U.S.D.A.										
PRIME	.7	.3	.6	1.7	1.7	.5	.8	0	0	
CHOICE	75.9	92.0	93.1	90.5	70.5	90.1	82.8	59.9	39.9	
GOOD	.7	0	0	0	6.6	0	8.1	.4	0	
STANDARD	0	0	0	0	0	0	0	0	0	
UNGRADED OR HOUSE BRAND	22.8	7.7	6.3	7.8	21.2	9.5	8.4	39.7	60.1	

TABLE 87B
PERCENTAGE OF FRESH BEEF SALES BY TYPE

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9235	8650	585	117	166	509	577	745	7121
U.S.D.A.									
PRIME	.7	.6	1.0	1.9	1.5	4.7	.4	.5	.4
CHOICE	75.9	75.4	83.5	82.2	86.0	84.0	82.0	78.7	74.1
GOOD	.7	.6	1.2	1.8	2.4	.2	2.7	4.8	0
STANDARD	0	0	0	.2	0	0	0	0	0
UNGRADED OR HOUSE BRAND	22.8	23.4	14.2	13.9	10.1	11.1	14.9	16.0	25.5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 88A
PERCENT OF FRESH BEEF CUTS RECEIVED AT STORES AS:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9311	251	988	1880	408	2552	404	228	2349	251
CARCASS	2.4	.7	.2	3.3	9.2	2.5	10.4	3.9	.5	0
PRIMALS	43.2	33.9	40.2	25.7	52.6	27.7	36.6	38.6	72.5	78.0
SUBPRIMALS	53.0	64.6	54.0	70.2	38.2	68.7	52.6	45.7	27.0	22.0
RETAIL CUTS	1.4	.7	5.6	.8	0	1.1	.4	11.8	0	0

TABLE 88B
PERCENT OF FRESH BEEF CUTS RECEIVED AT STORES AS:

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9311	8730	581	114	165	509	547	785	7191
CARCASS	2.4	1.9	11.2	11.6	12.5	4.6	4.7	3.9	1.6
PRIMALS	43.2	42.7	51.1	47.2	53.4	52.7	41.0	60.7	40.5
SUBPRIMALS	53.0	54.0	36.9	40.1	33.2	40.6	54.4	34.6	56.4
RETAIL CUTS	1.4	1.4	.8	1.1	1.0	2.1	0	.8	1.5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 89A
PERCENTAGE OF TYPES OF PACKAGING FOR FRESH BEEF RECEIVED AT STORES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9103	357	876	1830	407	2529	305	228	2323	248
VACUUM PACKED	95.5	98.9	95.2	93.6	87.4	96.6	94.0	92.6	96.7	100.0
SOFT-FILM OVERWRAPPED	1.6	.1	3.2	2.8	.9	.3	1.4	.5	2.3	0
OTHER	2.9	1.1	1.6	3.6	11.6	3.1	4.6	7.0	1.0	0

TABLE 89B
PERCENTAGE OF TYPES OF PACKAGING FOR FRESH BEEF RECEIVED AT STORES

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9103	8587	516	93	153	463	458	677	7259
VACUUM PACKED	95.5	96.5	78.7	84.6	85.1	88.7	89.4	96.9	96.5
SOFT-FILM OVERWRAPPED	1.6	1.4	6.3	1.9	5.0	2.0	7.8	1.8	1.1
OTHER	2.9	2.2	14.9	13.5	9.8	9.3	2.8	1.3	2.3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 90A
PERCENTAGE OF TYPES OF FRESH BEEF CUTS SOLD AT RETAIL

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9465	358	1022	1866	408	2579	404	226	2351	251
CONVENTIONAL RETAIL CUTS/PACKAGING	93.9	97.5	96.6	92.2	96.9	94.2	96.1	97.9	91.4	100.0
SUBPRIMAL, VACUUM PACKAGED	5.8	2.0	2.8	7.7	2.8	5.5	2.7	1.0	8.6	0
SUBPRIMAL, NON-VACUUM PACKAGED	.3	.4	.6	.1	.4	.3	1.2	1.1	0	0

TABLE 90B
PERCENTAGE OF TYPES OF FRESH BEEF CUTS SOLD AT RETAIL

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9465	8883	582	115	165	509	577	840	7259
CONVENTIONAL RETAIL CUTS/PACKAGING	93.9	93.9	94.3	92.2	95.8	94.9	97.1	96.9	93.3
SUBPRIMAL, VACUUM PACKAGED	5.8	5.9	4.2	3.2	3.1	4.4	1.9	2.9	6.6
SUBPRIMAL, NON-VACUUM PACKAGED	.3	.2	1.6	4.6	1.1	.7	1.1	.2	.1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 91A
PERCENTAGE OF GROUND BEEF GROUND IN STORE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9363	358	942	1881	408	2579	390	206	2348	251
GROUND IN STORE	82.7	99.0	94.4	90.2	92.3	64.8	73.0	66.2	89.7	89.8

TABLE 91B
PERCENTAGE OF GROUND BEEF GROUND IN STORE

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9363	8784	579	113	164	509	577	763	7237
GROUND IN STORE	82.7	81.8	96.5	96.2	99.5	93.2	90.9	91.8	79.7

TABLE 92A
PROPORTION OF TOTAL GROUND BEEF SALES BY TYPE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9239	358	1021	1879	301	2577	396	228	2253	226
REGULAR	44.1	34.8	27.4	21.3	38.0	62.3	55.3	29.6	53.0	30.8
LEAN	31.1	34.8	52.4	42.0	40.4	15.2	28.3	56.6	27.4	24.4
EXTRA-LEAN	13.3	22.0	15.8	6.0	16.5	18.2	8.3	10.2	10.5	27.8
OTHER	11.5	8.4	4.4	30.7	5.1	4.3	8.1	2.5	9.1	16.9

TABLE 92B
PROPORTION OF TOTAL GROUND BEEF SALES BY TYPE

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9239	8668	571	113	161	504	525	830	7106
REGULAR	44.1	43.8	49.0	45.3	51.9	52.4	38.5	42.5	43.9
LEAN	31.1	31.1	31.5	35.2	31.6	30.8	43.2	36.7	29.5
EXTRA-LEAN	13.3	13.1	16.1	15.8	13.0	14.4	16.5	10.3	13.3
OTHER	11.5	12.0	3.4	3.8	3.5	2.6	1.8	10.2	13.3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 93A
PERCENTAGE OF MEAT SUPPLIED BY

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7327	358	1022	1781	408	2538	403	228	338	251
COMPANY-OWNED WAREHOUSE OR PROCESSING PLANT	62.5	72.2	57.6	74.2	68.2	63.5	60.8	34.3	21.1	50.0
PACKER DIRECT DELIVER	21.1	10.8	12.0	11.0	8.2	32.9	17.3	3.5	38.6	43.4
WHOLESALER DIRECT DELIVER	16.4	17.0	30.4	14.8	23.6	3.6	21.9	62.3	40.1	6.6

TABLE 93B
PERCENTAGE OF MEAT SUPPLIED BY

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7327	6743	584	116	166	509	489	840	5207
COMPANY-OWNED WAREHOUSE OR PROCESSING PLANT	62.5	66.2	20.3	21.0	18.6	38.4	35.7	25.1	75.7
PACKER DIRECT DELIVER	21.1	20.4	28.5	25.2	24.0	19.6	17.2	29.9	19.9
WHOLESALER DIRECT DELIVER	16.4	13.4	51.1	53.8	57.4	42.0	47.0	45.0	4.3

TABLE 94A
PERCENTAGE OF MEAT DEPARTMENT SALES DEVOTED TO SERVICE AND SELF-SERVICE MEATS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	9280	358	1022	1846	408	2435	381	228	2351	251
SERVICE MEATS	10.8	2.1	13.5	12.9	36.5	5.1	4.4	12.6	11.3	13.7
SELF-SERVICE MEATS	89.2	97.9	86.5	87.1	63.5	94.9	95.6	87.4	88.7	86.3

TABLE 94B
PERCENTAGE OF MEAT DEPARTMENT SALES DEVOTED TO SERVICE AND SELF-SERVICE MEATS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	9280	8724	556	110	165	488	560	808	7149
SERVICE MEATS	10.8	10.6	13.1	19.8	8.1	11.1	22.1	4.6	10.5
SELF-SERVICE MEATS	89.2	89.4	86.9	80.2	91.9	88.9	77.9	95.4	89.5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 95A
MEAT-RELATED SERVICES AVAILABLE TO CUSTOMERS **

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	265	22	38	66	23	42	25	12	33	4
MEAT RECIPES	81.9	86.4	76.3	83.3	91.3	64.3	88.0	91.7	87.9	100.0
NUTRITION INFORMATION	61.9	54.5	73.7	62.1	82.6	45.2	52.0	83.3	60.6	50.0
STORE COUPONS FOR MEAT ITEMS	60.4	63.6	71.1	68.2	60.9	57.1	52.0	41.7	48.5	50.0
MEAT CUTTING CHARTS /EXPLANATIONS	58.1	45.5	57.9	53.0	73.9	57.1	68.0	83.3	54.5	25.0
CUSTOMER MEAT INFORMATION CENTER	16.6	22.7	21.1	16.7	17.4	9.5	20.0	25.0	3.0	75.0
COOKING CLASSES INVOLVING MEAT	9.4	9.1	13.2	7.6	8.7	9.5	12.0	16.7	6.1	-
OTHER	6.4	9.1	15.8	6.1	4.3	4.8	4.0	-	3.0	-

TABLE 95B
MEAT-RELATED SERVICES AVAILABLE TO CUSTOMERS **

	ALL COMPANIES	RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	265	83	182	85	54	53	26	19	28
MEAT RECIPES	81.9	82.3	81.9	78.8	74.1	90.6	84.6	89.5	82.1
NUTRITION INFORMATION	61.9	62.2	62.1	61.2	55.6	64.2	69.2	63.2	64.3
STORE COUPONS FOR MEAT ITEMS	60.4	66.3	57.7	55.3	66.7	56.6	61.5	57.9	71.4
MEAT CUTTING CHARTS /EXPLANATIONS	58.1	63.9	55.5	55.3	48.1	66.0	65.4	57.9	64.3
CUSTOMER MEAT INFORMATION CENTER	16.6	20.5	14.8	14.1	11.1	18.9	11.5	15.8	35.7
COOKING CLASSES INVOLVING MEAT	9.4	12.0	8.2	5.9	7.4	15.1	3.8	10.5	17.9
OTHER	6.4	7.2	6.0	4.7	9.3	3.8	7.7	15.8	3.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

TABLE 96A
SCANNING OF MEAT PRODUCTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7964	272	466	1545	354	2337	359	188	2277	166
HAVE SCANNERS, BUT DO NOT SCAN MEAT PRODUCTS	31.4	6.3	25.5	1.2	.3	14.2	9.2	-	87.0	-
SCAN MEAT PRODUCTS	68.6	93.8	74.5	98.8	99.7	85.8	90.8	100.0	13.0	100.0
PERCENT OF MEAT PRODUCTS SCANNED	67.7	77.4	73.3	47.3	66.4	87.4	61.4	43.6	68.3	33.4

TABLE 96B
SCANNING OF MEAT PRODUCTS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7964	7637	327	39	72	306	443	626	6478
HAVE SCANNERS, BUT DO NOT SCAN MEAT PRODUCTS	31.4	32.1	15.0	10.3	5.6	10.1	19.9	14.2	35.3
SCAN MEAT PRODUCTS	68.6	67.9	85.0	89.7	94.4	89.9	80.1	85.8	64.7
PERCENT OF MEAT PRODUCTS SCANNED	67.7	67.4	73.6	82.8	77.9	57.6	71.9	54.9	69.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 97

TYPICAL PERCENTAGE OF STORE AREA DEVOTED TO MEAT RECEIVING, PREPARATION AND STORAGE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	10	10	10	4580
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	10	8	15	89
10 - 30	12	8	20	112
31 - 100	14	10	16	384
101 - 250	10	8	15	356
251 - 500	10	10	12	475
OVER 500	10	9	11	3164
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	10	3	15	349
MIDDLE ATLANTIC	5	5	8	425
EAST NORTH CENTRAL	10	8	15	401
WEST NORTH CENTRAL	10	9	25	317
SOUTHEAST	10	9	12	2136
WEST SOUTH CENTRAL	12	10	12	295
MOUNTAIN	9	8	12	191
PACIFIC	10	9	11	215
CANADA	25	10	26	251
RETAIL AFFILIATION				
CHAIN	10	9	11	4151
INDEPENDENT	12	8	15	429

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 98A
PERCENTAGE OF COMPANIES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	361	27	39	87	36	54	25	22	56	15
PERCENT WITH ATM	30.5	40.7	41.0	27.6	47.2	22.2	40.0	18.2	25.0	13.3
TOTAL	332	24	36	76	32	51	24	20	54	15
PERCENT WITH NON-ATM ELECTRONIC DEVICES	13.0	29.2	36.1	7.9	15.6	7.8	16.7	5.0	5.6	-

TABLE 98B
PERCENTAGE OF COMPANIES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	361	115	246	120	74	54	37	27	49
PERCENT WITH ATM	30.5	54.8	19.1	7.5	24.3	35.2	43.2	48.1	71.4
TOTAL	332	105	227	115	67	47	33	23	47
PERCENT WITH NON-ATM ELECTRONIC DEVICES	13.0	21.0	9.3	8.7	11.9	4.3	9.1	8.7	38.3

TABLE 99A
PERCENTAGE OF STORES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	11,585	507	1,962	2,430	556	2,814	540	748	797	1,231
PERCENT WITH ATMS	15.9	20.7	15.6	15.0	26.3	20.0	25.6	10.4	15.9	.8
PERCENT WITH NON-ATM ELECTRONIC DEVICES	5.9	29.0	9.3	7.9	14.4	2.5	1.7	.1	.8	-

TABLE 99B
PERCENTAGE OF STORES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	11,585	10,889	696	147	220	412	817	1,342	8,647
PERCENT WITH ATMS	15.9	16.1	12.8	6.1	13.2	11.4	13.7	11.0	17.3
PERCENT WITH NON-ATM ELECTRONIC DEVICES	5.9	5.9	5.7	6.1	8.2	1.2	2.4	4.8	6.6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 100
TYPICAL NUMBER OF TRANSACTIONS PER MONTH PER MACHINE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	4000	2401	6002	1592
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	1733	1495	3033	7
10 - 30	1517	901	2630	12
31 - 100	3033	867	5599	29
101 - 250	2167	1733	4000	102
251 - 500	4299	2167	4333	69
OVER 500	4060	2600	6002	1373
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	2600	2600	5001	80
MIDDLE ATLANTIC	2847	1798	5001	211
EAST NORTH CENTRAL	3940	4000	4000	351
WEST NORTH CENTRAL	4333	4000	6500	62
SOUTHEAST	6002	2999	6002	561
WEST SOUTH CENTRAL	4645	3501	7384	134
MOUNTAIN	2401	2401	2401	74
PACIFIC	2002	1733	2002	109
CANADA	2167	1499	2167	10
RETAIL AFFILIATION				
CHAIN	4060	2401	6002	1537
INDEPENDENT	2630	1261	5599	55

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH ATMS

TABLE 101A
OWNERS OF AUTOMATIC TELLER MACHINES

	ALL MACHINES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1705	102	265	368	68	560	126	78	128	10
BANK	62.0	100.0	58.1	94.3	97.1	27.1	30.2	100.0	85.9	100.0
SUPERMARKET COMPANY	26.1	-	21.1	.3	1.5	62.3	30.2	-	-	-
THIRD PARTY SERVICE/PROVIDER	7.2	-	20.4	1.1	-	10.4	-	-	4.7	-
OTHER FINANCIAL INSTITUTION	1.1	-	.4	1.1	1.5	-	-	-	9.4	-
STATE FOOD ASSOCIATION	.1	-	-	-	-	.2	-	-	-	-
FOOD WHOLESALER	-	-	-	-	-	-	-	-	-	-
OTHER	3.6	-	-	3.3	-	-	39.7	-	-	-

TABLE 101B
OWNERS OF AUTOMATIC TELLER MACHINES

	ALL MACHINES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1705	1609	96	9	27	56	121	81	1411
BANK	62.0	61.8	65.6	100.0	85.2	42.9	85.1	92.6	58.3
SUPERMARKET COMPANY	26.1	26.7	15.6	-	3.7	25.0	1.7	2.5	30.2
THIRD PARTY SERVICE/PROVIDER	7.2	6.9	11.5	-	-	19.6	3.3	-	7.6
OTHER FINANCIAL INSTITUTION	1.1	.7	6.3	-	7.4	12.5	-	4.9	.4
STATE FOOD ASSOCIATION	.1	-	1.0	-	3.7	-	-	-	-
FOOD WHOLESALER	-	-	-	-	-	-	-	-	-
OTHER	3.6	3.9	-	-	-	-	9.9	-	3.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 102A
TYPE OF COMPENSATION FOR NON-SUPERMARKET OWNED ATM EQUIPMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL MACHINES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1315	99	240	367	54	268	138	18	121	10
SPACE & TRANSACTION FEE	49.0	84.8	22.9	82.3	33.3	26.1	9.4	66.7	74.4	-
TRANSACTION FEE	27.8	4.0	65.4	6.5	38.9	21.6	65.9	-	8.3	-
SPACE RENTAL	10.3	-	7.1	11.2	13.0	2.2	24.6	22.2	14.0	100.0
OTHER	12.9	11.1	4.6	-	14.8	50.0	-	11.1	3.3	-

TABLE 102B
TYPE OF COMPENSATION FOR NON-SUPERMARKET OWNED ATM EQUIPMENT

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL MACHINES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1315	1243	72	5	25	37	119	80	1049
SPACE & TRANSACTION FEE	49.0	51.3	8.3	20.0	-	13.5	63.0	55.0	49.5
TRANSACTION FEE	27.8	26.5	48.6	60.0	32.0	48.6	21.0	7.5	29.1
SPACE RENTAL	10.3	8.8	37.5	-	56.0	29.7	6.7	15.0	8.7
OTHER	12.9	13.4	5.6	20.0	12.0	8.1	9.2	22.5	12.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 103A
MIXTURE OF ATM TRANSACTIONS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL MACHINES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1573	85	238	337	45	592	135	74	60	7
CASH DISPENSING	79.4	84.8	82.4	78.6	78.2	79.4	64.2	80.7	97.6	74.0
BALANCE INQUIRY	13.3	10.2	13.6	10.6	5.8	16.6	22.0	1.9	1.4	0
DEPOSIT TAKING	4.3	2.8	3.7	5.9	13.2	2.9	.1	16.4	0	16.0
BALANCE TRANSFER	1.3	2.2	.3	2.0	1.3	1.1	1.4	.8	1.0	10.0
OTHER	1.7	0	0	2.9	.2	0	12.3	.2	0	0

TABLE 103B
MIXTURE OF ATM TRANSACTIONS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL MACHINES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1573	1535	38	4	13	22	64	51	1419
CASH DISPENSING	79.4	79.3	82.0	80.0	79.1	84.9	74.4	78.3	79.6
BALANCE INQUIRY	13.3	13.5	8.9	12.0	11.1	6.6	16.2	12.0	13.2
DEPOSIT TAKING	4.3	4.2	6.4	2.5	7.7	6.0	4.7	6.9	4.2
BALANCE TRANSFER	1.3	1.4	2.2	3.5	1.1	2.5	3.7	1.1	1.2
OTHER	1.7	1.6	.7	2.0	1.1	.1	1.0	.5	1.8

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF ATM MACHINES

TABLE 104A

RATING ATM OPERATION 1 INDICATING POOR AND 5 INDICATING EXCELLENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	99	9	14	21	14	12	10	3	14	2
EASE OF USE	4.0	4.2	4.1	3.8	3.7	4.3	4.1		3.9	
CUSTOMER CONVENIENCE	4.0	4.1	4.1	3.7	3.7	4.3	3.8		4.0	
OVERALL PERFORMANCE	3.8	3.9	3.5	3.7	3.6	4.3	3.5		3.9	
MAINTENANCE	3.8	4.0	3.6	3.8	3.4	4.2	3.5		3.7	
HARDWARE RELIABILITY	3.7	3.8	3.6	4.0	3.2	4.2	3.1		3.8	
CUSTOMER ACCEPTANCE	3.6	3.6	3.6	3.5	3.4	3.8	3.8		3.7	
CUSTOMER USAGE	3.2	3.6	3.4	3.1	3.1	3.3	3.2		2.9	
STORE SAVINGS	2.1	2.4	2.1	2.3	2.5	2.2	1.5		1.8	

TABLE 104B

RATING ATM OPERATION 1 INDICATING POOR AND 5 INDICATING EXCELLENT

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	99	56	43	9	14	19	15	12	30
EASE OF USE	4.0	4.0	4.0	4.2	4.0	3.8	3.7	3.8	4.3
CUSTOMER CONVENIENCE	4.0	4.0	4.0	4.0	3.9	4.0	3.7	4.0	4.1
OVERALL PERFORMANCE	3.8	3.8	3.7	3.6	3.7	3.7	3.7	3.7	4.0
MAINTENANCE	3.8	3.7	3.8	3.6	3.8	3.9	3.6	3.1	4.0
HARDWARE RELIABILITY	3.7	3.7	3.8	3.4	3.8	3.9	3.5	3.4	3.9
CUSTOMER ACCEPTANCE	3.6	3.7	3.6	3.6	3.4	3.8	3.7	3.6	3.7
CUSTOMER USAGE	3.2	3.2	3.2	3.1	2.9	3.4	3.3	3.3	3.2
STORE SAVINGS	2.1	2.1	2.3	2.3	2.6	2.0	2.1	2.0	2.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 105A
EFFECT OF ATM ON CHECK VOLUME

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	88	7	12	20	12	10	10	3	13	1
CHECK VOLUME DECREASED	22.7	57.1	16.7	25.0	16.7	30.0	-		30.8	
CHECK VOLUME REMAINED THE SAME	72.7	28.6	75.0	75.0	83.3	60.0	90.0		69.2	
CHECK VOLUME INCREASED	4.5	14.3	8.3	-	-	10.0	10.0		-	

TABLE 105B
EFFECT OF ATM ON CHECK VOLUME

	ALL COMPANIES	RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	88	47	41	8	15	17	12	9	27
CHECK VOLUME DECREASED	22.7	23.4	22.0	25.0	33.3	11.8	16.7	22.2	25.9
CHECK VOLUME REMAINED THE SAME	72.7	70.2	75.6	75.0	66.7	82.4	83.3	55.6	70.4
CHECK VOLUME INCREASED	4.5	6.4	2.4	-	-	5.9	-	22.2	3.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 106A
EFFECT OF ATM ON CASH VOLUME

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	86	6	13	21	13	8	10	3	11	1
CASH VOLUME DECREASED	3.5	-	7.7	9.5	-	-	-		-	
CASH VOLUME REMAINED THE SAME	72.1	50.0	61.5	66.7	69.2	87.5	100.0		72.7	
CASH VOLUME INCREASED	24.4	50.0	30.8	23.8	30.8	12.5	-		27.3	

TABLE 106B
EFFECT OF ATM ON CASH VOLUME

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	86	48	38	8	13	16	13	10	26
CASH VOLUME DECREASED	3.5	2.1	5.3	-	15.4	-	7.7	-	-
CASH VOLUME REMAINED THE SAME	72.1	77.1	65.8	50.0	69.2	68.8	76.9	90.0	73.1
CASH VOLUME INCREASED	24.4	20.8	28.9	50.0	15.4	31.3	15.4	10.0	26.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 107A

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT TWO YEARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ATM										
TOTAL RESPONDING	186	12	16	49	15	32	13	11	27	11
WILL INSTALL	25.3	25.0	62.5	12.2	6.7	21.9	7.7	36.4	33.3	54.5
WILL NOT INSTALL	74.7	75.0	37.5	87.8	93.3	78.1	92.3	63.6	66.7	45.5
NON-ATM ELECTRONIC FINANCIAL SERVICE										
TOTAL RESPONDING	157	10	8	46	15	30	10	8	23	7
WILL INSTALL	10.8	20.0	25.0	4.3	-	10.0	-	12.5	26.1	14.3
WILL NOT INSTALL	89.2	80.0	75.0	95.7	100.0	90.0	100.0	87.5	73.9	85.7

TABLE 107B

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT TWO YEARS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
ATM									
TOTAL RESPONDING	186	40	146	80	41	28	16	9	12
WILL INSTALL	25.3	42.5	20.5	13.8	22.0	32.1	31.3	33.3	83.3
WILL NOT INSTALL	74.7	57.5	79.5	86.3	78.0	67.9	68.8	66.7	16.7
NON-ATM ELECTRONIC FINANCIAL SERVICE									
TOTAL RESPONDING	157	30	127	71	36	25	11	8	6
WILL INSTALL	10.8	13.3	10.2	8.5	11.1	12.0	-	25.0	33.3
WILL NOT INSTALL	89.2	86.7	89.8	91.5	88.9	88.0	100.0	75.0	66.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 108A

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT FIVE YEARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ATM										
TOTAL RESPONDING	135	6	7	38	12	25	11	13	19	4
WILL INSTALL	43.7	50.0	42.9	42.1	41.7	40.0	27.3	38.5	63.2	50.0
WILL NOT INSTALL	56.3	50.0	57.1	57.9	58.3	60.0	72.7	61.5	36.8	50.0
NON-ATM ELECTRONIC FINANCIAL SERVICE										
TOTAL RESPONDING	117	4	8	34	10	21	10	10	17	3
WILL INSTALL	29.1	50.0	37.5	20.6	30.0	23.8	30.0	20.0	47.1	
WILL NOT INSTALL	70.9	50.0	62.5	79.4	70.0	76.2	70.0	80.0	52.9	

TABLE 108B

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT FIVE YEARS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
ATM									
TOTAL RESPONDING	135	27	108	59	32	23	12	8	1
WILL INSTALL	43.7	44.4	43.5	44.1	46.9	39.1	50.0	37.5	
WILL NOT INSTALL	56.3	55.6	56.5	55.9	53.1	60.9	50.0	62.5	
NON-ATM ELECTRONIC FINANCIAL SERVICE									
TOTAL RESPONDING	117	26	91	46	30	20	12	7	2
WILL INSTALL	29.1	34.6	27.5	26.1	36.7	20.0	41.7	28.6	
WILL NOT INSTALL	70.9	65.4	72.5	73.9	63.3	80.0	58.3	71.4	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 109A

NUMBER OF COMPANIES OPERATING EFT-POS DIRECT DEBIT AT CHECKOUT -- CLEARED THROUGH NETWORK

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	276	19	31	59	30	42	19	16	47	15
YES	3.3	-	3.2	3.4	6.7	4.8	10.5	-	-	-
AVERAGE NUMBER OF SUPERMARKETS	6.6	0	1.0	2.0	1.0	24.0	2.0	0	0	0
AS A PILOT ONLY	1.8	-	3.2	5.1	-	2.4	-	-	-	-
NO	94.9	100.0	93.5	91.5	93.3	92.9	89.5	100.0	100.0	100.0

TABLE 109B

NUMBER OF COMPANIES OPERATING EFT-POS DIRECT DEBIT AT CHECKOUT -- CLEARED THROUGH NETWORK

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	276	99	177	76	55	47	33	23	42
YES	3.3	4.0	2.8	2.6	-	6.4	-	-	9.5
AVERAGE NUMBER OF SUPERMARKETS	6.6	12.3	2.0	1.0	0	2.7	0	0	12.3
AS A PILOT ONLY	1.8	5.1	-	-	-	-	3.0	4.3	7.1
NO	94.9	90.9	97.2	97.4	100.0	93.6	97.0	95.7	83.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 110A
NUMBER OF COMPANIES OPERATING EFT-POS DIRECT DEBIT AT CHECKOUT -- CLEARED THROUGH AUTOMATED CLEARING HOUSE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	248	16	27	54	27	38	17	16	40	13
YES	1.2	-	-	-	3.7	2.6	-	-	2.5	-
AVERAGE NUMBER OF SUPERMARKETS	2.7	0	0	0	1.0	6.0	0	0	1.0	0
AS A PILOT ONLY	.4	-	-	-	-	-	-	-	2.5	-
NO	98.4	100.0	100.0	100.0	96.3	97.4	100.0	100.0	95.0	100.0

TABLE 110B
NUMBER OF COMPANIES OPERATING EFT-POS DIRECT DEBIT AT CHECKOUT -- CLEARED THROUGH AUTOMATED CLEARING HOUSE

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	248	92	156	71	48	39	29	23	38
YES	1.2	-	1.9	1.4	-	5.1	-	-	-
AVERAGE NUMBER OF SUPERMARKETS	2.7	0	2.7	1.0	0	3.5	0	0	0
AS A PILOT ONLY	.4	1.1	-	-	-	-	-	-	2.6
NO	98.4	98.9	98.1	98.6	100.0	94.9	100.0	100.0	97.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 111A

PERCENTAGE OF STORES OPERATING GENERAL MERCHANDISE AND HABA DEPARTMENTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6396	10	441	2144	316	686	304	144	2145	206
PERCENTAGE WITH SEPARATE GENERAL MERCHANDISE DEPT	87.5	100.0	80.3	92.2	31.0	99.3	97.0	79.2	95.2	12.1
PERCENTAGE WITH SEPARATE HABA DEPT	87.5	100.0	81.0	92.2	31.0	99.3	97.0	79.2	95.2	12.1
PERCENTAGE WITH COMBINED GENERAL MERCHANDISE/HABA DEPARTMENT	8.5	-	9.1	3.6	60.8	.4	1.3	19.4	.9	87.9

TABLE 111B

PERCENTAGE OF STORES OPERATING GENERAL MERCHANDISE AND HABA DEPARTMENTS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6396	6158	238	55	73	342	355	449	5122
PERCENTAGE WITH SEPARATE GENERAL MERCHANDISE DEPT	87.5	87.7	81.1	81.8	90.4	78.7	85.6	69.7	89.8
PERCENTAGE WITH SEPARATE HABA DEPT	87.5	87.8	81.1	81.8	90.4	78.7	85.6	69.7	89.8
PERCENTAGE WITH COMBINED GENERAL MERCHANDISE/HABA DEPARTMENT	8.5	8.2	17.6	16.4	9.6	20.8	12.7	29.8	5.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 112A
TYPE OF STORES OPERATING SEPARATE GENERAL MERCHANDISE DEPARTMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1924	10	256	387	98	592	295	114	147	25
CONVENTIONAL	57.4	100.0	51.6	49.1	57.1	61.5	52.5	70.2	63.3	100.0
SUPERSTORES	29.1	-	32.8	45.0	20.4	34.5	11.9	25.4	8.8	-
COMBINATION	8.4	-	14.1	5.4	1.0	.8	25.1	2.6	15.0	-
WAREHOUSE	5.1	-	1.6	.5	21.4	3.2	10.5	1.8	12.9	-

TABLE 112B
TYPE OF STORES OPERATING SEPARATE GENERAL MERCHANDISE DEPARTMENT

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1924	1747	177	42	53	269	290	313	957
CONVENTIONAL	57.4	55.2	79.1	85.7	90.6	71.0	70.7	76.7	40.2
SUPERSTORES	29.1	30.9	11.3	9.5	9.4	3.7	19.0	15.7	45.6
COMBINATION	8.4	8.9	3.4	2.4	-	5.2	4.8	.3	13.8
WAREHOUSE	5.1	5.0	6.2	2.4	-	20.1	5.5	7.3	.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 113A
TYPE OF STORES OPERATING SEPARATE HABA DEPARTMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	2931	10	259	1391	98	592	295	114	147	25
CONVENTIONAL	40.2	100.0	51.0	18.8	57.1	61.5	52.5	70.2	63.3	100.0
SUPERSTORES	39.4	-	33.6	55.2	20.4	34.5	11.9	25.4	8.8	-
COMBINATION	17.0	-	13.9	25.7	1.0	.8	25.1	2.6	15.0	-
WAREHOUSE	3.4	-	1.5	.3	21.4	3.2	10.5	1.8	12.9	-

TABLE 113B
TYPE OF STORES OPERATING SEPARATE HABA DEPARTMENT

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	2931	2757	174	42	50	269	228	313	2029
CONVENTIONAL	40.2	37.7	79.3	85.7	92.0	71.0	67.1	76.7	25.2
SUPERSTORES	39.4	41.2	10.9	9.5	8.0	3.7	19.7	15.7	51.5
COMBINATION	17.0	17.8	3.4	2.4	-	5.2	6.1	.3	23.1
WAREHOUSE	3.4	3.2	6.3	2.4	-	20.1	7.0	7.3	.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 114A

TYPE OF STORES OPERATING COMBINED GENERAL MERCHANDISE/HABA DEPARTMENTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	405	0	40	78	51	3	4	28	20	181
CONVENTIONAL	78.8		80.0	73.1	47.1		100.0	32.1	90.0	95.0
SUPERSTORES	14.6		20.0	15.4	52.9		-	42.9	-	-
COMBINATION	2.0		-	-	-		-	25.0	5.0	-
WAREHOUSE	4.7		-	11.5	-		-	-	5.0	5.0

TABLE 114B

TYPE OF STORES OPERATING COMBINED GENERAL MERCHANDISE/HABA DEPARTMENTS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	405	363	42	9	7	71	45	134	139
CONVENTIONAL	78.8	78.5	81.0	100.0	71.4	71.8	26.7	90.3	87.1
SUPERSTORES	14.6	14.6	14.3	-	-	16.9	73.3	6.0	4.3
COMBINATION	2.0	1.9	2.4	-	14.3	9.9	-	-	-
WAREHOUSE	4.7	5.0	2.4	-	14.3	1.4	-	3.7	8.6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 115
TYPICAL PERCENTAGE OF GENERAL MERCHANDISE SALES DUE TO SEASONAL PRODUCTS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	11.0	5.5	25.0	103
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	10.0	3.0	20.0	33
10 - 30	21.4	16.4	30.0	16
31 - 100	11.0	8.0	30.0	18
101 - 250	10.4	5.0	15.0	14
251 - 500	10.0	9.0	25.0	7
OVER 500	10.0	5.0	30.0	15
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	25.0	6.5	40.0	4
MIDDLE ATLANTIC	22.7	10.0	30.0	15
EAST NORTH CENTRAL	15.0	10.0	25.0	31
WEST NORTH CENTRAL	10.0	1.0	20.0	7
SOUTHEAST	9.5	2.0	20.0	14
WEST SOUTH CENTRAL	17.9	5.5	30.0	6
MOUNTAIN	6.0	.5	10.0	6
PACIFIC	10.0	9.2	20.0	18
CANADA				2
RETAIL AFFILIATION				
CHAIN	10.4	5.5	20.0	42
INDEPENDENT	15.0	8.0	25.0	61

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 116A
REASONS COMPANY ADDS PRODUCTS TO GENERAL MERCHANDISE DEPARTMENT **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	135	5	16	35	15	17	11	9	25	2
POPULARITY OF PRODUCT	83.0	80.0	87.5	71.4	100.0	76.5	81.8	100.0	84.0	
CUSTOMER CONVENIENCE	52.6	60.0	56.3	60.0	46.7	47.1	45.5	55.6	48.0	
ADVERTISING	52.6	60.0	68.8	48.6	73.3	58.8	27.3	33.3	52.0	
MANUFACTURER'S TRACK RECORD	31.9	20.0	25.0	25.7	20.0	41.2	45.5	44.4	40.0	
DEMOGRAPHICS	22.2	-	25.0	17.1	13.3	17.6	36.4	33.3	28.0	
ALLOWANCES	21.5	-	37.5	20.0	13.3	29.4	36.4	11.1	16.0	
MANUFACTURER'S ESTIMATE OF SALES	7.4	20.0	6.3	8.6	13.3	5.9	9.1	11.1	-	
OTHER	8.1	-	-	17.1	-	11.8	-	-	12.0	

TABLE 116B
REASONS COMPANY ADDS PRODUCTS TO GENERAL MERCHANDISE DEPARTMENT **

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	135	50	85	44	24	26	15	8	18
POPULARITY OF PRODUCT	83.0	86.0	81.2	81.8	87.5	76.9	86.7	100.0	77.8
CUSTOMER CONVENIENCE	52.6	54.0	51.8	52.3	50.0	42.3	46.7	62.5	72.2
ADVERTISING	52.6	52.0	52.9	56.8	50.0	50.0	46.7	50.0	55.6
MANUFACTURER'S TRACK RECORD	31.9	34.0	30.6	34.1	25.0	30.8	26.7	25.0	44.4
DEMOGRAPHICS	22.2	26.0	20.0	20.5	8.3	34.6	33.3	12.5	22.2
ALLOWANCES	21.5	22.0	21.2	18.2	12.5	50.0	-	-	27.8
MANUFACTURER'S ESTIMATE OF SALES	7.4	10.0	5.9	2.3	12.5	3.8	20.0	-	11.1
OTHER	8.1	6.0	9.4	11.4	8.3	-	20.0	-	5.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 117A

REASONS COMPANY DELETES PRODUCTS FROM GENERAL MERCHANDISE DEPARTMENT **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	136	5	16	36	15	17	11	9	25	2
LACK OF SALES	99.3	80.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
MANUFACTURER DISCONTINUES ITEM	70.6	80.0	56.3	69.4	66.7	64.7	54.5	88.9	88.0	
DUPLICATE OF BETTER SELLING ITEM	62.5	40.0	62.5	55.6	73.3	70.6	54.5	77.8	60.0	
LACK OF PROFITABILITY	36.8	40.0	37.5	50.0	13.3	35.3	27.3	44.4	32.0	
OTHER	2.9	-	-	2.8	-	-	9.1	-	8.0	

TABLE 117B

REASONS COMPANY DELETES PRODUCTS FROM GENERAL MERCHANDISE DEPARTMENT **

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	136	50	86	45	24	26	15	8	18
LACK OF SALES	99.3	100.0	98.8	97.8	100.0	100.0	100.0	100.0	100.0
MANUFACTURER DISCONTINUES ITEM	70.6	76.0	67.4	75.6	62.5	65.4	93.3	75.0	55.6
DUPLICATE OF BETTER SELLING ITEM	62.5	68.0	59.3	66.7	41.7	57.7	66.7	100.0	66.7
LACK OF PROFITABILITY	36.8	40.0	34.9	31.1	45.8	38.5	33.3	25.0	44.4
OTHER	2.9	4.0	2.3	2.2	-	3.8	6.7	-	5.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 118A

PERCENTAGE OF STORES CARRYING FOLLOWING PRODUCT LINES IN GENERAL MERCHANDISE DEPARTMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	4344	10	296	483	290	676	295	141	2042	111
PET SUPPLIES	99.6	100.0	98.0	100.0	97.2	100.0	100.0	100.0	99.9	100.0
HOUSEWARES	98.4	100.0	94.9	98.8	96.9	94.2	100.0	100.0	100.0	100.0
MAGAZINES	96.7	100.0	66.2	99.0	100.0	94.7	100.0	100.0	99.9	100.0
STATIONERY	94.9	90.0	95.9	93.2	99.3	94.1	88.1	98.6	95.2	100.0
BOOKS	84.0	70.0	63.9	89.4	96.6	54.6	71.2	99.3	99.0	-
AUTOMOTIVE SUPPLIES	82.1	60.0	73.3	58.8	47.6	76.2	90.5	88.7	94.5	77.5
GREETING CARDS	74.1	20.0	64.2	85.7	96.2	53.1	85.1	82.3	77.4	24.3
TOYS	62.5	50.0	55.1	73.7	59.3	68.9	82.7	96.5	52.1	100.0
OTHER	5.6	-	25.3	26.1	9.3	.9	1.4	-	.3	-

TABLE 118B

PERCENTAGE OF STORES CARRYING FOLLOWING PRODUCT LINES IN GENERAL MERCHANDISE DEPARTMENT

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	4344	4126	218	52	66	313	349	352	3212
PET SUPPLIES	99.6	99.7	99.1	98.1	98.5	100.0	99.7	97.7	99.8
HOUSEWARES	98.4	98.4	98.2	92.3	100.0	98.7	98.0	100.0	98.3
MAGAZINES	96.7	96.6	98.6	94.2	100.0	99.7	88.3	96.3	97.4
STATIONERY	94.9	95.2	88.1	88.5	89.4	86.3	90.5	99.7	95.9
BOOKS	84.0	84.5	74.8	75.0	71.2	90.7	79.1	77.3	85.0
AUTOMOTIVE SUPPLIES	82.1	82.3	78.9	78.8	90.9	81.5	60.2	83.2	84.3
GREETING CARDS	74.1	73.9	78.4	76.9	72.7	73.5	72.8	64.2	75.4
TOYS	62.5	62.3	66.5	73.1	75.8	72.8	66.5	72.4	59.6
OTHER	5.6	4.8	20.6	15.4	12.1	9.9	13.8	10.2	3.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 119A
AVERAGE LINEAR FEET PER STORE DEVOTED TO FOLLOWING PRODUCT LINES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
HOUSEWARES										
TOTAL	4200	6	280	461	275	592	294	141	2040	111
LINEAR FEET	32.8	48.3	20.8	35.3	26.9	63.8	45.4	28.5	25.1	14.8
AUTOMOTIVE SUPPLIES										
TOTAL	3506	6	215	277	132	470	267	125	1928	86
LINEAR FEET	13.7	12.3	12.9	8.0	14.8	9.0	23.0	12.5	15.0	4.0
MAGAZINES										
TOTAL	4114	8	181	462	284	595	294	141	2038	111
LINEAR FEET	13.9	21.5	11.3	13.9	15.4	15.0	15.9	13.5	12.9	20.1
BOOKS										
TOTAL	3575	7	185	423	274	325	210	140	2011	0
LINEAR FEET	13.8	7.7	9.5	7.0	9.1	6.5	10.9	10.5	17.9	
STATIONERY										
TOTAL	4045	8	269	442	282	591	260	139	1943	111
LINEAR FEET	13.5	4.3	14.2	13.2	8.0	10.3	15.1	19.5	14.9	10.3
GREETING CARDS										
TOTAL	3189	1	186	406	273	350	250	116	1580	27
LINEAR FEET	45.7		43.1	46.9	58.2	32.1	61.1	40.6	44.9	21.2
PET SUPPLIES										
TOTAL	4242	9	275	467	276	631	294	141	2038	111
LINEAR FEET	8.9	11.9	11.0	9.0	8.6	8.4	10.9	11.1	8.2	13.4
TOYS										
TOTAL	2649	4	162	345	166	421	244	136	1060	111
LINEAR FEET	14.4	4.0	6.7	10.2	7.1	27.5	20.7	14.8	12.3	6.7
OTHER										
TOTAL	237	0	75	126	26	0	4	0	6	0
LINEAR FEET	9.3		8.4	8.0	16.8		8.0		15.3	

NOTE: LINEAR FEET WEIGHTED BY NUMBER OF STORES CARRYING PRODUCT LINE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 119B
AVERAGE LINEAR FEET PER STORE DEVOTED TO FOLLOWING PRODUCT LINES

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
HOUSEWARES									
TOTAL	4200	4027	173	38	55	255	342	352	3158
LINEAR FEET	32.8	33.0	27.7	28.6	35.9	22.6	23.2	26.8	35.3
AUTOMOTIVE SUPPLIES									
TOTAL	3506	3360	146	34	50	212	208	293	2709
LINEAR FEET	13.7	13.8	12.3	14.1	13.8	9.4	13.8	10.3	14.5
MAGAZINES									
TOTAL	4114	3937	177	40	54	261	293	339	3127
LINEAR FEET	13.9	13.6	20.0	23.5	19.8	13.0	14.8	19.2	13.0
BOOKS									
TOTAL	3575	3448	127	31	28	241	273	272	2730
LINEAR FEET	13.8	13.8	11.7	12.7	16.4	8.6	11.0	9.7	14.9
STATIONERY									
TOTAL	4045	3881	164	38	48	227	301	351	3080
LINEAR FEET	13.5	13.5	14.3	13.8	19.3	11.6	9.5	14.9	13.8
GREETING CARDS									
TOTAL	3189	3044	145	34	37	221	250	226	2421
LINEAR FEET	45.7	46.4	31.1	32.7	33.6	26.1	51.5	49.6	46.9
PET SUPPLIES									
TOTAL	4242	4063	179	42	54	262	333	344	3207
LINEAR FEET	8.9	8.9	8.9	9.5	11.1	8.5	8.9	11.5	8.7
TOYS									
TOTAL	2649	2537	112	28	36	185	232	255	1913
LINEAR FEET	14.4	14.5	13.2	16.7	19.2	9.7	7.5	10.2	16.2
OTHER									
TOTAL	237	200	37	6	7	26	48	36	114
LINEAR FEET	9.3	7.9	16.6	26.5	33.7	10.9	13.5	8.0	5.1

NOTE: LINEAR FEET WEIGHTED BY NUMBER OF STORES CARRYING PRODUCT LINE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 120A
PERCENTAGE OF STORES CARRYING FOLLOWING PRODUCT LINES IN HEALTH AND BEAUTY AIDS DEPARTMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5371	10	260	1549	290	676	299	141	2035	111
SHAMPOOS	99.9	100.0	98.5	100.0	100.0	100.0	100.0	100.0	100.0	100.0
DENTAL PRODUCTS	99.9	100.0	98.5	100.0	100.0	100.0	100.0	100.0	100.0	100.0
DEODORANTS	99.9	100.0	98.5	100.0	100.0	100.0	100.0	100.0	100.0	100.0
SHAVING ITEMS	99.9	100.0	98.5	100.0	100.0	100.0	100.0	100.0	100.0	100.0
ANALGESICS	99.8	100.0	98.5	99.5	100.0	100.0	100.0	100.0	100.0	100.0
COLD MEDICINES	98.6	100.0	98.5	100.0	100.0	100.0	100.0	100.0	100.0	35.1
HAIR CONDITIONERS	98.3	90.0	87.3	96.6	100.0	100.0	100.0	100.0	99.7	100.0
MOUTHWASHES	98.0	90.0	67.7	99.1	100.0	100.0	100.0	100.0	99.7	100.0
VITAMINS	97.9	80.0	87.7	99.7	100.0	93.3	89.3	100.0	100.0	100.0
OTHER	22.7	-	15.4	73.9	4.8	.9	-	-	.6	-

TABLE 120B
PERCENTAGE OF STORES CARRYING FOLLOWING PRODUCT LINES IN HEALTH AND BEAUTY AIDS DEPARTMENT

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5371	5159	212	50	69	306	349	313	4284
SHAMPOOS	99.9	99.9	100.0	100.0	100.0	100.0	98.9	100.0	100.0
DENTAL PRODUCTS	99.9	99.9	100.0	100.0	100.0	100.0	98.9	100.0	100.0
DEODORANTS	99.9	99.9	100.0	100.0	100.0	100.0	98.9	100.0	100.0
SHAVING ITEMS	99.9	99.9	100.0	100.0	100.0	100.0	98.9	100.0	100.0
ANALGESICS	99.8	99.9	96.2	100.0	100.0	97.4	98.9	100.0	100.0
COLD MEDICINES	98.6	98.5	100.0	100.0	100.0	100.0	98.9	100.0	98.3
HAIR CONDITIONERS	98.3	98.3	96.7	100.0	98.6	98.0	98.9	93.3	98.6
MOUTHWASHES	98.0	98.1	96.7	100.0	98.6	98.0	94.8	100.0	98.1
VITAMINS	97.9	97.9	97.2	96.0	98.6	89.9	86.2	100.0	99.2
OTHER	22.7	22.9	16.5	14.0	2.9	5.6	6.6	4.2	27.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 121A

AVERAGE LINEAR FEET PER STORE DEVOTED TO FOLLOWING PRODUCT LINES

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ANALGESICS										
TOTAL	5222	9	256	1458	271	665	278	141	2033	111
LINEAR FEET	8.7	8.1	8.5	7.8	9.0	14.1	8.6	7.7	7.9	5.8
SHAMPOOS										
TOTAL	5222	9	256	1458	271	665	278	141	2033	111
LINEAR FEET	11.2	20.9	10.0	11.5	10.6	19.2	11.7	12.8	8.1	16.8
DENTAL PRODUCTS										
TOTAL	5222	9	256	1458	271	665	278	141	2033	111
LINEAR FEET	9.6	15.4	9.0	6.7	9.0	17.0	11.3	10.2	9.2	9.8
DEODORANTS										
TOTAL	5222	9	256	1458	271	665	278	141	2033	111
LINEAR FEET	8.2	9.8	6.1	6.0	6.3	15.5	8.7	5.9	8.0	7.6
COLD MEDICINES										
TOTAL	5150	9	256	1458	271	665	278	141	2033	39
LINEAR FEET	7.5	8.8	4.8	3.9	7.1	14.3	9.5	8.3	7.9	8.0
SHAVING ITEMS										
TOTAL	5222	9	256	1458	271	665	278	141	2033	111
LINEAR FEET	7.0	5.0	4.4	5.5	6.0	12.4	7.6	6.0	6.9	4.9
VITAMINS										
TOTAL	5111	7	228	1454	271	620	246	141	2033	111
LINEAR FEET	9.5	3.3	5.4	5.7	7.3	14.7	11.1	5.7	11.6	7.6
MOUTHWASHES										
TOTAL	5057	8	176	1381	271	665	278	141	2026	111
LINEAR FEET	7.8	5.8	5.0	5.6	5.1	13.4	4.7	5.2	8.6	10.7
HAIR CONDITIONERS										
TOTAL	5069	8	227	1342	271	665	278	141	2026	111
LINEAR FEET	6.4	10.8	4.1	2.6	6.1	15.7	5.3	6.5	6.0	12.3
OTHER										
TOTAL	1198	0	39	1145	0	1	0	0	13	0
LINEAR FEET	4.2		7.6	4.0					8.0	

NOTE: LINEAR FEET WEIGHTED BY NUMBER OF STORES CARRYING PRODUCT LINE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 121B
AVERAGE LINEAR FEET PER STORE DEVOTED TO FOLLOWING PRODUCT LINES

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
ANALGESICS									
TOTAL	5222	5052	170	40	54	273	333	313	4209
LINEAR FEET	8.7	8.8	6.5	6.6	6.9	26.0	6.7	9.1	7.8
SHAMPOOS									
TOTAL	5222	5052	170	40	54	273	333	313	4209
LINEAR FEET	11.2	11.3	10.2	9.1	9.1	29.1	9.6	14.5	10.0
DENTAL PRODUCTS									
TOTAL	5222	5052	170	40	54	273	333	313	4209
LINEAR FEET	9.6	9.7	9.0	9.2	8.4	27.3	9.5	10.4	8.5
DEODORANTS									
TOTAL	5222	5052	170	40	54	273	333	313	4209
LINEAR FEET	8.2	8.2	6.8	6.3	6.1	26.3	5.5	9.3	7.2
COLD MEDICINES									
TOTAL	5150	4980	170	40	54	273	333	313	4137
LINEAR FEET	7.5	7.6	5.8	6.7	6.6	24.8	5.1	9.5	6.4
SHAVING ITEMS									
TOTAL	5222	5052	170	40	54	273	333	313	4209
LINEAR FEET	7.0	7.1	4.7	5.3	4.9	25.3	4.1	6.0	6.2
VITAMINS									
TOTAL	5111	4947	164	38	53	242	289	313	4176
LINEAR FEET	9.5	9.6	5.6	7.8	4.8	27.4	5.6	7.5	8.9
MOUTHWASHES									
TOTAL	5057	4896	161	38	53	267	257	313	4129
LINEAR FEET	7.8	7.9	4.9	4.3	4.5	25.6	3.8	7.2	7.1
HAIR CONDITIONERS									
TOTAL	5069	4908	161	38	53	267	271	292	4148
LINEAR FEET	6.4	6.4	6.3	6.5	6.5	26.2	4.8	8.5	5.1
OTHER									
TOTAL	1198	1170	28	5	2	12	23	0	1156
LINEAR FEET	4.2	4.1	6.8	6.4			7.4		4.1

NOTE: LINEAR FEET WEIGHTED BY NUMBER OF STORES CARRYING PRODUCT LINE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 122A
GENERAL MERCHANDISE PRODUCTS WITH GREATEST SALES GROWTH **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	4619	4	354	957	140	648	286	137	2007	86
HOUSEWARES/KITCHEN ITEMS	67.8	75.0	41.0	37.8	4.3	63.6	27.6	63.5	97.3	100.0
VIDEO RENTAL/EQUIPMENT	56.4	-	36.2	15.4	25.0	23.0	71.3	20.4	95.4	-
FILM/FILM SUPPLIES	46.8	-	7.9	7.7	-	.8	50.7	-	95.1	-
BATTERIES	18.3	-	-	62.2	49.3	9.0	19.2	24.1	1.8	-
AUTOMOTIVE SUPPLIES	16.0	-	28.2	19.0	3.6	68.4	2.8	-	.1	-
TOYS	15.7	-	1.1	53.8	.7	8.5	27.3	32.8	1.3	-
PET SUPPLIES	15.4	25.0	.8	54.3	3.6	1.7	18.2	-	1.7	100.0
GREETING CARDS	10.3	-	36.2	4.6	60.7	14.5	19.2	12.4	2.7	-
STATIONERY/SCHOOL SUPPLIES	10.3	75.0	33.3	1.7	42.9	12.2	58.0	24.1	-	-
MAGAZINES AND BOOKS	7.7	-	27.1	6.1	11.4	9.7	-	12.4	1.0	100.0
HARDWARE	7.3	-	27.4	9.1	-	13.7	-	24.1	1.6	-
HOSIERY	6.0	-	27.7	6.5	58.6	-	-	-	1.8	-
BABY PRODUCTS	2.8	-	-	-	-	17.0	-	-	.9	-
CONTINUITY/PROMOTIONAL ITEMS	1.9	-	9.0	5.5	-	-	-	3.6	-	-
SEASONAL/HOLIDAY ITEMS	.6	-	2.0	.1	-	-	-	-	.9	-
GARDENING ITEMS	.5	-	-	1.7	-	-	-	-	.4	-
SOFT GOODS	.1	-	-	.1	-	-	-	-	.2	-
OTHER	.5	-	-	-	-	.8	-	-	.9	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING GENERAL MERCHANDISE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 122B

GENERAL MERCHANDISE PRODUCTS WITH GREATEST SALES GROWTH **

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	4619	4463	156	29	40	272	322	288	3668
HOUSEWARES/KITCHEN ITEMS	67.8	68.3	55.1	55.2	35.0	57.4	44.7	37.5	73.4
VIDEO RENTAL/EQUIPMENT	56.4	57.4	26.9	-	45.0	15.8	37.6	25.3	64.1
FILM/FILM SUPPLIES	46.8	47.5	26.3	10.3	5.0	9.9	13.7	-	56.8
BATTERIES	18.3	18.5	13.5	13.8	5.0	9.9	11.2	51.4	17.2
AUTOMOTIVE SUPPLIES	16.0	16.1	14.7	31.0	12.5	26.1	13.7	20.1	15.1
TOYS	15.7	15.6	18.6	3.4	40.0	42.3	28.6	-	13.6
PET SUPPLIES	15.4	15.1	25.6	17.2	10.0	32.0	9.6	-	16.0
GREETING CARDS	10.3	10.1	17.3	17.2	12.5	30.5	28.6	24.3	6.1
STATIONERY/SCHOOL SUPPLIES	10.3	10.2	13.5	20.7	-	24.3	22.7	31.3	6.5
MAGAZINES AND BOOKS	7.7	7.0	27.6	24.1	12.5	26.5	8.1	4.5	6.4
HARDWARE	7.3	7.3	9.0	-	20.0	13.2	-	11.5	7.1
HOSIERY	6.0	6.2	.6	3.4	-	9.2	30.4	19.8	2.6
BABY PRODUCTS	2.8	2.8	3.2	-	12.5	5.1	-	38.2	-
CONTINUITY/PROMOTIONAL ITEMS	1.9	1.9	3.2	-	12.5	-	-	-	2.3
SEASONAL/HOLIDAY ITEMS	.6	.4	5.1	3.4	-	9.2	-	-	-
GARDENING ITEMS	.5	.3	6.4	6.9	20.0	-	4.3	-	-
SOFT GOODS	.1	-	3.8	13.8	5.0	-	-	-	-
OTHER	.5	.4	3.8	10.3	7.5	6.6	-	-	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING GENERAL MERCHANDISE

SOURCE FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 123A
HEALTH AND BEAUTY AIDS WITH GREATEST SALES GROWTH **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5739	5	395	2027	140	680	286	137	1983	86
DENTAL ITEMS	78.1	100.0	38.7	91.9	90.7	27.8	36.0	-	98.6	100.0
COLD/PAIN REMEDIES	52.0	-	52.2	1.8	62.1	61.5	63.3	36.5	96.9	100.0
HAIR CARE	46.8	60.0	75.2	68.1	82.1	55.1	87.4	96.4	2.4	100.0
VITAMINS	36.2	-	61.5	58.4	52.1	45.1	36.7	83.9	2.7	-
EYE CARE	24.9	-	20.0	34.0	-	55.7	50.7	75.9	1.7	-
COSMETICS	13.1	-	-	32.0	8.6	2.2	10.8	12.4	1.3	-
DEODORANT	5.2	-	.3	7.7	2.9	18.1	2.8	3.6	-	-
FEMININE HYGIENE	2.8	60.0	24.6	-	-	8.5	-	-	.1	-
SHAVING ITEMS	1.8	-	-	4.7	-	-	-	-	.3	-
DIET AIDS	1.6	-	-	-	-	13.1	1.0	-	.1	-
SKIN CARE/LOTIONS	.7	-	-	-	-	-	-	20.4	.5	-
OTHER	1.8	-	-	2.7	-	.1	12.2	-	.7	-

TABLE 123B
HEALTH AND BEAUTY AIDS WITH GREATEST SALES GROWTH **

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5739	5590	149	32	39	288	313	327	4740
DENTAL ITEMS	78.1	78.2	71.8	65.6	61.5	78.1	63.3	51.1	81.1
COLD/PAIN REMEDIES	52.0	52.2	47.0	37.5	51.3	45.5	47.9	29.4	54.4
HAIR CARE	46.8	46.2	67.8	75.0	82.1	79.2	78.6	100.0	38.6
VITAMINS	36.2	36.4	32.2	25.0	61.5	29.5	48.2	37.0	35.7
EYE CARE	24.9	25.2	12.8	-	-	3.1	29.7	33.0	25.7
COSMETICS	13.1	13.3	2.0	3.1	-	5.9	46.6	-	12.3
DEODORANT	5.2	4.9	15.4	15.6	33.3	13.5	14.1	-	4.2
FEMININE HYGIENE	2.8	2.8	3.4	6.3	-	1.0	-	17.7	2.0
SHAVING ITEMS	1.8	1.7	5.4	6.3	-	6.3	-	-	1.7
DIET AIDS	1.6	1.6	2.7	3.1	7.7	-	-	-	1.9
SKIN CARE/LOTIONS	.7	.5	6.7	3.1	-	12.8	-	-	-
OTHER	1.8	1.7	5.4	9.4	2.6	5.6	9.9	-	1.1

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING HEALTH AND BEAUTY AIDS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 124A
REASONS COMPANY OPERATES GENERAL MERCHANDISE DEPARTMENTS **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	143	6	16	37	16	20	11	9	25	3
OFFER MORE ONE-STOP SHOPPING	88.1	66.7	93.8	89.2	87.5	90.0	72.7	100.0	92.0	
INCREASE AVERAGE GROSS MARGIN	83.9	83.3	100.0	73.0	81.3	85.0	81.8	100.0	88.0	
INCREASE DOLLAR PROFITS	83.2	50.0	75.0	86.5	93.8	95.0	81.8	77.8	80.0	
INCREASE OVERALL SALES	79.7	83.3	87.5	78.4	87.5	70.0	90.9	88.9	76.0	
APPEALS TO CONSUMER WANTS	67.8	83.3	68.8	73.0	62.5	55.0	63.6	77.8	72.0	
COMPETITION FROM OTHER STORES	33.6	16.7	56.3	35.1	25.0	45.0	18.2	33.3	24.0	
OTHER	1.4	-	-	-	-	-	9.1	-	4.0	

** MULTIPLE RESPONSES ACCEPTED

TABLE 124B
REASONS COMPANY OPERATES GENERAL MERCHANDISE DEPARTMENTS **

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	143	54	89	47	24	28	16	10	18
OFFER MORE ONE-STOP SHOPPING	88.1	92.6	85.4	80.9	87.5	96.4	87.5	80.0	100.0
INCREASE AVERAGE GROSS MARGIN	83.9	92.6	78.7	87.2	62.5	85.7	87.5	80.0	100.0
INCREASE DOLLAR PROFITS	83.2	90.7	78.7	78.7	66.7	92.9	93.8	80.0	94.4
INCREASE OVERALL SALES	79.7	79.6	79.8	87.2	66.7	82.1	75.0	50.0	94.4
APPEALS TO CONSUMER WANTS	67.8	70.4	66.3	74.5	54.2	64.3	68.8	50.0	83.3
COMPETITION FROM OTHER STORES	33.6	38.9	30.3	29.8	33.3	17.9	37.5	50.0	55.6
OTHER	1.4	1.9	1.1	-	4.2	-	-	-	5.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 125A

PERCENTAGE OF GENERAL MERCHANDISE PRODUCTS HANDLED BY FOLLOWING SELECTION SYSTEMS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	133	5	15	35	13	20	9	9	25	2
SUPERMARKET COMPANY	33.6	0	39.7	46.0	27.5	24.3	40.1	28.0	28.2	
WHOLESALER	30.3	8.0	35.5	33.2	24.9	28.4	14.6	45.6	34.7	
SERVICE MERCHANDISER	32.5	92.0	18.5	20.7	44.1	34.9	42.6	23.7	35.7	
OTHER	3.6	0	6.3	.1	3.4	12.4	2.8	2.8	1.4	

TABLE 125B

PERCENTAGE OF GENERAL MERCHANDISE PRODUCTS HANDLED BY FOLLOWING SELECTION SYSTEMS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	133	53	80	43	20	27	16	9	18
SUPERMARKET COMPANY	33.6	48.5	23.7	20.3	18.0	37.1	44.8	40.6	63.9
WHOLESALER	30.3	21.4	36.2	41.3	32.4	28.5	18.9	31.7	14.1
SERVICE MERCHANDISER	32.5	26.5	36.4	34.4	43.7	32.5	36.3	23.3	16.5
OTHER	3.6	3.6	3.6	4.0	5.9	1.9	0	4.4	5.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 126A

PERCENTAGE OF GENERAL MERCHANDISE PRODUCTS HANDLED BY FOLLOWING STOCK MAINTENANCE SYSTEMS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	136	5	15	36	14	20	10	9	24	3
SERVICE MERCHANDISER	34.6	92.0	24.8	27.5	35.1	40.3	46.9	31.7	29.2	
STORE PERSONNEL	64.2	8.0	69.2	72.2	64.9	59.7	53.1	62.2	70.6	
OTHER	1.2	0	6.0	.3	0	0	0	6.1	.2	

TABLE 126B

PERCENTAGE OF GENERAL MERCHANDISE PRODUCTS HANDLED BY FOLLOWING STOCK MAINTENANCE SYSTEMS

		RETAIL AFFIL.		1985 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	136	54	82	44	21	27	16	10	18
SERVICE MERCHANDISER	34.6	29.5	37.9	37.6	47.0	30.6	35.4	22.4	24.7
STORE PERSONNEL	64.2	68.5	61.4	61.1	53.0	69.3	58.7	77.6	75.0
OTHER	1.2	1.9	.7	1.4	0	.2	5.9	0	.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 127

TYPICAL PERCENTAGE OF GENERAL MERCHANDISE PRODUCTS WAREHOUSED BY COMPANY'S OWN WAREHOUSE/WHOLESALER

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	80.0	10.0	99.0	138
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	95.0	50.0	100.0	46
10 - 30 MILLION	74.0	0	90.0	22
31 - 100 MILLION	70.0	.3	90.0	27
101 - 250 MILLION	77.5	18.5	95.0	16
251 - 500 MILLION	40.0	10.0	94.0	9
OVER 500 MILLION	78.0	45.0	98.0	18
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	0	0	25.0	6
MIDDLE ATLANTIC	90.0	32.5	96.5	16
EAST NORTH CENTRAL	90.0	45.0	100.0	36
WEST NORTH CENTRAL	65.0	2.0	80.0	14
SOUTHEAST	87.5	35.0	100.0	20
WEST SOUTH CENTRAL	70.0	0	81.0	10
MOUNTAIN	99.5	40.0	100.0	8
PACIFIC	85.0	2.0	90.0	25
CANADA				3
RETAIL AFFILIATION				
CHAIN	75.0	25.0	95.0	53
INDEPENDENT	90.0	5.0	100.0	85

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 128

PROFILE BY STORE TYPE -- MEDIANS, ALL STORES CATEGORY

	GENERAL MERCHANDISE	HEALTH/ BEAUTY AIDS	GM/HABA COMBINED
TOTAL	3345	4435	80
PERCENT OF SELLING AREA DEVOTED TO DEPARTMENT	16	8	10
TOTAL	664	913	3576
NUMBER OF STORE PERSONNEL IN DEPARTMENT	1	1	2
TOTAL	992	914	2104
SALES PER LABOR HOUR IN DEPARTMENT (IN DOLLARS)	200.00	300.00	284.00
TOTAL	2988	3020	1198
NUMBER OF ITEMS IN DEPARTMENT	7000	3500	1900
TOTAL	629	796	3696
NUMBER OF LABOR HOURS PER STORE PER WEEK IN DEPARTMENT	9	40	60

TABLE 129

PROFILE BY STORE TYPE -- MEDIANS, COMBINATION STORES

	GENERAL MERCHANDISE	HEALTH/ BEAUTY AIDS	GM/HABA COMBINED
TOTAL	42	41	33
PERCENT OF SELLING AREA DEVOTED TO DEPARTMENT	25	10	28
TOTAL	39	39	82
NUMBER OF STORE PERSONNEL IN DEPARTMENT	2	1	18
TOTAL	6	6	113
SALES PER LABOR HOUR IN DEPARTMENT (IN DOLLARS)	120.00	160.00	180.00
TOTAL	40	39	76
NUMBER OF ITEMS IN DEPARTMENT	4,000	3,000	20,115
TOTAL	32	32	81
NUMBER OF LABOR HOURS PER STORE PER WEEK IN DEPARTMENT	80	50	449

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 130
PROFILE BY STORE TYPE -- MEDIANS, SUPER STORES

	GENERAL MERCHANDISE	HEALTH/ BEAUTY AIDS	GM/HABA COMBINED
TOTAL	169	147	63
PERCENT OF SELLING AREA DEVOTED TO DEPARTMENT	8	8	17
TOTAL	160	138	70
NUMBER OF STORE PERSONNEL IN DEPARTMENT	2	2	11
TOTAL	97	96	45
SALES PER LABOR HOUR IN DEPARTMENT (IN DOLLARS)	130.00	150.00	134.89
TOTAL	140	124	40
NUMBER OF ITEMS IN DEPARTMENT	5,000	1,800	14,758
TOTAL	95	73	57
NUMBER OF LABOR HOURS PER STORE PER WEEK IN DEPARTMENT	80	80	130

TABLE 131
PROFILE BY STORE TYPE -- MEDIANS, CONVENTIONAL STORES

	GENERAL MERCHANDISE	HEALTH/ BEAUTY AIDS	GM/HABA COMBINED
TOTAL	433	417	302
PERCENT OF SELLING AREA DEVOTED TO DEPARTMENT	5	5	17
TOTAL	162	124	513
NUMBER OF STORE PERSONNEL IN DEPARTMENT	1	1	1
TOTAL	138	137	124
SALES PER LABOR HOUR IN DEPARTMENT (IN DOLLARS)	114.00	200.00	135.93
TOTAL	464	488	110
NUMBER OF ITEMS IN DEPARTMENT	1900	1400	2800
TOTAL	209	206	250
NUMBER OF LABOR HOURS PER STORE PER WEEK IN DEPARTMENT	16	18	120

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 132
PROFILE BY STORE TYPE -- MEDIANS, WAREHOUSE STORES

	GENERAL MERCHANDISE	HEALTH/ BEAUTY AIDS	GM/HABA COMBINED
TOTAL	56	56	25
PERCENT OF SELLING AREA DEVOTED TO DEPARTMENT	3	3	5
TOTAL	2	2	43
NUMBER OF STORE PERSONNEL IN DEPARTMENT	1	1	3
TOTAL	27	27	22
SALES PER LABOR HOUR IN DEPARTMENT (IN DOLLARS)	175.00	165.00	300.00
TOTAL	46	54	27
NUMBER OF ITEMS IN DEPARTMENT	20	90	5000
TOTAL	27	27	29
NUMBER OF LABOR HOURS PER STORE PER WEEK IN DEPARTMENT	6	8	200

NOTE: DATA WEIGHTED BY NUMBER OF STORES

TABLE 133
TYPICAL PERCENTAGE OF COMPANY'S ADVERTISING BUDGET DEVOTED TO GENERAL MERCHANDISE DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.0	0	5.0	91
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	.1	0	2.0	30
10 - 30	2.3	.5	5.0	18
31 - 100	2.0	.5	5.0	17
101 - 250	.8	.4	2.5	10
251 - 500	2.0	0	8.0	5
OVER 500	3.0	2.0	5.0	11
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	0	0	0	6
MIDDLE ATLANTIC	2.3	.9	6.5	8
EAST NORTH CENTRAL	.8	0	5.0	26
WEST NORTH CENTRAL	2.0	.6	3.0	9
SOUTHEAST	.8	0	3.0	14
WEST SOUTH CENTRAL	2.0	0	5.0	5
MOUNTAIN	1.0	.1	5.0	7
PACIFIC	4.5	.8	5.0	16
CANADA				0
RETAIL AFFILIATION				
CHAIN	2.8	.8	5.0	32
INDEPENDENT	.6	0	5.0	59

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 134

TYPICAL PERCENTAGE OF COMPANY'S ADVERTISING BUDGET DEVOTED TO HEALTH AND BEAUTY AIDS DEPARTMENT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	2.5	.5	5.0	92
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	.5	0	3.0	30
10 - 30	5.0	.5	8.0	18
31 - 100	3.0	.7	5.0	20
101 - 250	2.0	1.5	3.0	9
251 - 500	4.0	1.0	7.0	4
OVER 500	5.0	3.0	7.0	11
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	0	0	0	6
MIDDLE ATLANTIC	3.0	1.6	9.5	8
EAST NORTH CENTRAL	1.5	0	5.0	26
WEST NORTH CENTRAL	2.0	.1	7.0	10
SOUTHEAST	1.0	.5	3.0	15
WEST SOUTH CENTRAL	8.0	5.0	10.0	5
MOUNTAIN	4.0	1.5	5.0	6
PACIFIC	5.0	1.8	7.0	16
CANADA				0
RETAIL AFFILIATION				
CHAIN	5.0	2.0	6.0	32
INDEPENDENT	1.0	.1	5.0	60

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 135

TYPICAL PERCENTAGE OF COMPANY'S ADVERTISING BUDGET DEVOTED TO GENERAL MERCHANDISE AND HEALTH AND BEAUTY AIDS DEPARTMENTS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	5.0	5.0	10.0	10
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				3
10 - 30				1
31 - 100				1
101 - 250				1
251 - 500				2
OVER 500				2
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST				0
MIDDLE ATLANTIC				3
EAST NORTH CENTRAL				0
WEST NORTH CENTRAL				0
SOUTHEAST				1
WEST SOUTH CENTRAL				2
MOUNTAIN				0
PACIFIC				3
CANADA				1
RETAIL AFFILIATION				
CHAIN	5.0	5.0	10.0	5
INDEPENDENT	5.0	5.0	5.0	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 136

TYPICAL SIZE IN SQUARE FEET OF STORE WITH GENERAL MERCHANDISE OR HEALTH AND BEAUTY AIDS DEPARTMENT -- ALL STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	29,626	29,626	33,347	4443
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				1
10 - 30	18,000	18,000	18,000	5
31 - 100	20,000	18,000	45,000	104
101 - 250	27,500	27,500	38,500	131
251 - 500	25,000	25,000	30,000	97
OVER 500	29,650	29,626	33,347	4105
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST				0
MIDDLE ATLANTIC	19,500	19,500	30,000	137
EAST NORTH CENTRAL	33,347	15,000	33,347	1746
WEST NORTH CENTRAL	27,500	27,500	27,500	141
SOUTHEAST	32,000	25,000	32,000	411
WEST SOUTH CENTRAL	23,000	23,000	23,000	31
MOUNTAIN	45,000	45,000	45,000	28
PACIFIC	29,650	29,626	29,700	1949
CANADA				0
RETAIL AFFILIATION				
CHAIN	29,626	29,626	33,347	4422
INDEPENDENT	20,000	20,000	25,000	21

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 137

TYPICAL SIZE IN SQUARE FEET OF STORE WITH GENERAL MERCHANDISE OR HEALTH AND BEAUTY AIDS DEPARTMENT -- COMBINATION STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	55,000	35,000	56,000	119
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				0
10 - 30				1
31 - 100	35,000	35,000	52,000	5
101 - 250				2
251 - 500				0
OVER 500	55,000	35,000	56,000	111
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST				0
MIDDLE ATLANTIC	35,000	35,000	35,000	32
EAST NORTH CENTRAL	62,000	62,000	62,000	6
WEST NORTH CENTRAL				0
SOUTHEAST				2
WEST SOUTH CENTRAL	56,000	55,000	56,000	73
MOUNTAIN				2
PACIFIC	35,000	35,000	39,532	4
CANADA				0
RETAIL AFFILIATION				
CHAIN	55,000	35,000	56,000	113
INDEPENDENT	39,532	35,000	52,000	6

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 138

TYPICAL SIZE IN SQUARE FEET OF STORE WITH GENERAL MERCHANDISE OR HEALTH AND BEAUTY AIDS DEPARTMENT -- SUPER STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	42,000	37,000	44,000	191
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	32,000	19,250	38,000	4
10 - 30				3
31 - 100	40,000	40,000	50,000	8
101 - 250	42,000	33,000	42,000	46
251 - 500	35,000	35,000	57,000	27
OVER 500	44,000	37,000	44,000	103
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST				0
MIDDLE ATLANTIC	35,000	35,000	50,000	21
EAST NORTH CENTRAL	44,000	44,000	44,000	75
WEST NORTH CENTRAL	42,000	42,000	57,000	44
SOUTHEAST	40,000	38,000	50,000	9
WEST SOUTH CENTRAL	37,000	37,000	37,000	32
MOUNTAIN	30,000	30,000	30,000	7
PACIFIC				3
CANADA				0
RETAIL AFFILIATION				
CHAIN	44,000	37,000	44,000	170
INDEPENDENT	34,000	33,000	60,000	21

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 139
TYPICAL SIZE IN SQUARE FEET OF STORE WITH GENERAL MERCHANDISE OR HEALTH AND BEAUTY AIDS DEPARTMENT -- CONVENTIONAL STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	20,750	17,750	27,000	600
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	16,300	12,000	20,000	31
10 - 30	17,500	12,500	20,750	28
31 - 100	25,000	15,000	25,000	87
101 - 250	15,000	14,000	21,000	115
251 - 500	25,000	20,000	40,000	96
OVER 500	26,000	18,500	30,000	243
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	12,000	12,000	12,000	4
MIDDLE ATLANTIC	35,000	25,000	35,000	97
EAST NORTH CENTRAL	25,000	20,000	27,000	50
WEST NORTH CENTRAL	40,000	21,500	40,000	62
SOUTHEAST	18,500	14,000	20,000	160
WEST SOUTH CENTRAL	26,000	26,000	30,000	102
MOUNTAIN	25,500	25,500	25,500	6
PACIFIC	15,000	15,000	15,000	37
CANADA	18,500	18,500	18,500	82
RETAIL AFFILIATION				
CHAIN	25,000	18,500	27,000	523
INDEPENDENT	18,000	13,000	20,500	77

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 140

TYPICAL SIZE IN SQUARE FEET OF STORE WITH GENERAL MERCHANDISE OR HEALTH AND BEAUTY AIDS DEPARTMENT -- WAREHOUSE STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	31,000	8,000	60,000	69
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER				0
10 - 3				1
31 - 100	8,000	8,000	60,000	38
101 - 250	20,000	20,000	50,000	6
251 - 500	50,000	50,000	60,000	20
OVER 500	31,000	31,000	31,000	4
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST				0
MIDDLE ATLANTIC	20,000	20,000	20,000	4
EAST NORTH CENTRAL				2
WEST NORTH CENTRAL	50,000	50,000	50,000	14
SOUTHEAST	60,000	60,000	60,000	12
WEST SOUTH CENTRAL	8,000	8,000	8,000	27
MOUNTAIN				2
PACIFIC	60,000	43,128	60,000	4
CANADA	31,000	31,000	31,000	4
RETAIL AFFILIATION				
CHAIN	25,500	8,000	50,000	62
INDEPENDENT	60,000	60,000	60,000	7

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 141A

GENERAL MERCHANDISE ITEMS COMPANY PLANS TO ADD TO STORES ** (PERCENTAGE OF STORES)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1782	4	256	785	14	305	176	111	45	86
HOUSEWARES	23.6	-	-	24.8	14.3	55.4	30.7	.9	-	-
VIDEO RENTAL/SUPPLIES	21.8	25.0	9.8	32.2	85.7	20.0	2.3	-	73.3	-
TOYS	8.0	-	38.3	5.4	-	-	-	.9	2.2	-
SOFT GOODS	5.0	-	2.0	3.2	7.1	18.7	-	-	2.2	-
FILM PROCESSING	3.9	-	1.2	.4	-	8.9	2.8	-	2.2	34.9
HARDWARE	1.6	-	-	-	85.7	-	-	13.5	2.2	-
STATIONERY	1.5	75.0	8.6	-	-	-	-	-	2.2	-
SMALL APPLIANCES	1.2	50.0	2.0	-	-	-	-	-	-	17.4
FRAMING	.8	-	2.0	1.0	-	-	-	.9	-	-
SPORTING GOODS	.7	-	-	-	-	-	-	9.9	2.2	-
GARDEN ITEMS	.7	-	-	.3	-	-	-	9.0	-	-
OTHER	15.5	75.0	39.8	.8	-	16.4	55.1	17.1	-	

TABLE 141B

GENERAL MERCHANDISE ITEMS COMPANY PLANS TO ADD TO STORES ** (PERCENTAGE OF STORES)

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1782	1703	79	13	19	91	156	236	1267
HOUSEWARES	23.6	24.4	6.3	23.1	-	61.5	10.3	71.6	14.0
VIDEO RENTAL/SUPPLIES	21.8	21.0	39.2	15.4	15.8	23.1	34.0	-	24.5
TOYS	8.0	8.0	6.3	15.4	5.3	2.2	-	-	10.8
SOFT GOODS	5.0	4.8	8.9	15.4	26.3	3.3	14.1	24.2	-
FILM PROCESSING	3.9	3.8	6.3	7.7	5.3	3.3	-	10.6	3.1
HARDWARE	1.6	1.6	1.3	7.7	-	-	7.7	6.4	-
STATIONERY	1.5	.9	13.9	7.7	-	11.0	-	2.1	.8
SMALL APPLIANCES	1.2	1.2	2.5	-	-	2.2	-	-	1.6
FRAMING	.8	.8	-	-	-	-	5.1	2.5	-
SPORTING GOODS	.7	.6	2.5	7.7	5.3	-	6.4	-	-
GARDEN ITEMS	.7	.6	2.5	15.4	-	-	-	4.2	-
OTHER	15.5	15.9	8.9	15.4	-	39.6	14.1	-	17.1

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 142A

HEALTH AND BEAUTY AIDS COMPANY PLANS TO ADD TO STORES **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	3134	0	286	83	26	534	172	19	1928	86
OTC HEALTH CARE	29.3	-	.3	98.8	7.7	17.2	40.7	5.3	24.5	229.1
ETHNIC PRODUCTS	8.1	-	38.1	-	-	26.2	-	26.3	-	-
COSMETICS	7.1	-	33.9	100.0	50.0	.6	-	-	1.3	-
EYE CARE	3.1	-	20.3	-	-	7.5	-	-	-	-
VITAMINS	2.6	-	-	-	46.2	-	15.7	-	.1	46.5
BABY PRODUCTS	1.7	-	-	-	-	-	31.4	-	-	-
OTHER	2.8	-	3.5	-	-	14.6	-	-	-	-

TABLE 142B

HEALTH AND BEAUTY AIDS COMPANY PLANS TO ADD TO STORES **

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	3134	3110	24	9	9	82	97	123	2814
OTC HEALTH CARE	29.3	29.4	20.8	22.2	11.1	43.9	-	1.6	31.2
ETHNIC PRODUCTS	8.1	8.1	4.2	-	11.1	-	36.1	89.4	3.8
COSMETICS	7.1	6.8	37.5	44.4	55.6	2.4	33.0	-	6.4
EYE CARE	3.1	3.2	-	-	-	-	-	32.5	2.1
VITAMINS	2.6	2.5	4.2	11.1	-	32.9	12.4	-	1.4
BABY PRODUCTS	1.7	1.7	-	-	-	65.9	-	-	-
OTHER	2.8	2.8	-	-	-	82.9	-	8.1	.4

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1986

TABLE 143

OPERATING RESULTS

(Current & Historical)

	1977	1978	1979	1980	1981	1982	1983	1984	1985
Profit									
Gross Profit with Warehouse	22.0%	22.6%	22.3%	22.4%	23.0%	23.4%	23.7%	24.1%	24.0%
Gross Profit without Warehouse	19.7	21.0	20.5	20.9	20.9	21.2	21.5	21.6	22.3
Store Door Margin	18.5	18.9	18.9	18.7	18.8	19.2	19.4	20.2	19.6
Net Profit (before taxes)	1.4	1.7	1.9	1.5	1.4	1.5	1.0	1.6	1.8
Expenses									
Store Labor	8.4	8.5	8.3	8.4	8.5	8.8	8.8	8.9	8.6
Fringe Benefits	1.7	2.0	1.8	1.9	2.0	2.1	2.2	2.3	2.3
Store Supply	0.9	0.9	0.9	1.0	0.9	0.9	0.9	0.9	1.0
Rent and Real Estate	1.3	1.3	1.2	1.3	1.3	1.4	1.4	1.3	1.3
Utilities	0.9	1.0	1.0	1.0	1.1	1.2	1.2	1.2	1.1

Source: Operations Review 1977-1985

TABLE 144

PERCENT OF DISPOSABLE INCOME SPENT ON FOOD

	All Food	Food at Home	Food Away from Home
1985	15.4%	10.9%	4.5%
1984	15.1	10.8	4.3
1983	15.6	11.2	4.4
1982	16.0	11.6	4.4
1981	16.0	11.8	4.2
1980	16.5	12.1	4.3
1979	16.5	12.1	4.4
1978	16.3	12.0	4.3
1977	16.5	12.2	4.3

Source: U.S. Department of Agriculture
Economics, Statistics & Cooperatives Service

TABLE 145

CONSUMER PRICE INDEX*

Annual Average

	ALL ITEMS		FOOD AT HOME		FOOD AWAY FROM HOME	
	C.P.I.	Percent Change	C.P.I.	Percent Change	C.P.I.	Percent Change
1985	322.2	3.6	296.8	1.4	346.6	4.0
1984	311.1	4.3	292.6	3.7	333.4	4.2
1983	298.4	3.2	282.2	1.1	319.9	4.4
1982	289.1	6.1	279.2	3.4	306.5	5.3
1981	272.4	10.4	269.9	7.3	291.0	9.0
1980	246.8	13.5	251.5	8.0	267.0	9.9
1979	217.4	11.3	232.9	10.8	242.9	11.2
1978	195.4	7.7	210.2	10.5	218.4	9.0
1977	181.5	6.5	190.2	6.0	200.3	7.5

* 1967 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 146

HISTORICAL DATA

Average Percent Change in Retail Sales	
1984 vs. 1985	5.0%
1983 vs. 1984	7.3
1982 vs. 1983	7.6
1981 vs. 1982	8.7
1980 vs. 1981	9.3
1979 vs. 1980	14.1
1978 vs. 1979	15.0
1977 vs. 1978	13.1
1976 vs. 1977	9.5

Average Percent Change in Retail Sales-Identical Stores	
1984 vs. 1985	3.6%
1983 vs. 1984	5.6
1982 vs. 1983	6.1
1981 vs. 1982	7.7
1980 vs. 1981	8.1
1979 vs. 1980	11.4
1978 vs. 1979	11.7
1977 vs. 1978	11.8
1976 vs. 1977	8.0

Average Weekly Store Sales	
1985	$206,543
1984	175,900
1983	153,600
1982	180,500
1981	159,000
1980	110,000
1979	110,000
1978	88,337
1977	75,000

Average Weekly Sales Per Square Foot	
1985	$8.43
1984	8.00
1983	6.95
1982	7.90
1981	6.75
1980	6.94
1979	6.49
1978	6.17
1977	5.80

Average Sales Per Transaction	
1985	$16.33
1984	15.36
1983	14.60
1982	14.33
1981	14.23
1980	12.10
1979	11.60
1978	10.28
1977	9.85

Average Number of Items in a Supermarket	
1985	17,459
1984	15,379
1983	16,719
1982	13,067
1981	12,877
1980	14,145
1979	12,745
1978	11,767
1976	9,000

Definitions

Chain	Retailers with eleven (11) or more supermarkets.
Delivery Cost	The total amount of delivery expense charged to the retail store operation, including salaries, fringe benefits including payroll taxes, equipment depreciation and rental, taxes and licenses, insurance, repairs, gas and oil, and operating supplies.
Fringe Benefits	The company's share of payroll taxes (including those payable under the Federal Insurance Contribution Act, state and federal unemployment compensation, Workers' Compensation), holiday and vacation pay, group insurance, pension, profit sharing, retirement, severance pay, and bonus unless it is a significant amount paid on a regular, recurring basis.
Identical Stores	Supermarkets in operation throughout the entire two-year period, 1983 and 1984.
Independent	Retailers with ten (10) or fewer supermarkets.
Scratch Rate	Percentage of items ordered from the distribution center but not shipped to the store.
Selling Area	Customer area of the store.
Shortage (Shrink)	Computed using the "retail method," it includes all inventory shortages, including disappearance, spoilage and damaged merchandise for which there is no supplier reimbursement. Shrink is reported at retail value as a percent of sales.
Store Door Margin	Gross profit after any wholesaler's fees minus warehouse, delivery, and headquarter's cost are deducted.
Store Labor Expense	The payment to all store personnel including the store manager, for straight and overtime wages and regular recurring bonus payments. Payments for sickness, absence, excused time off, training and commissions are included in this figure.
Store Rent and Real Estate	Rent paid for store building and parking lot, real estate taxes and insurance and amortization of lease-hold improvement.
Store Supplies	The expense incurred for checkout, wrapping and prepackaging supplies and maintenance supplies for cleaning, window washing, etc.
Supermarket	A retail food store with annual sales of at least $2 million a year.
	Conventional Supermarkets (under 30,000 total sq. ft.).
	Super Stores (over 30,000 total sq. ft., expanded food and non-food selection).
	Combination Stores (over 30,000 total sq. ft. and at least 25% of area in General Merchandise).

Limited Assortment Stores (carries less than 1000 items and offers few if any perishables with a "no frills" shopping environment).

Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service).

Utilities Expense The cost for heating, light, water and power.

Warehouse Cost The total amount of warehouse expense charged to the retail store operation, including such items as salaries, fringe benefits, warehouse rental, equipment rental or depreciation, utility cost and supplies.

Wholesaler A company which reported wholesale sales in 1984 to supermarkets, institutions and/or businesses other than those owned by the company and primarily engaged in selling a general line of food and related products to food stores.

A. Cooperative:
(Independent) – Retailers who are stockholder members of cooperative wholesale buying groups.

B. Voluntary:
(Independent) – Retailers who belong to voluntary merchandising groups sponsored by wholesalers and who operate under a common name.

C. Unaffiliated:
(Independent) – Retailers who are not affiliated with either wholesale, cooperative or voluntary merchandising groups sponsored by wholesalers.

Region The geographic area in which the company headquarters is located. Listed below are the states which fall into each region.

Northeast
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Middle Atlantic
New Jersey
New York
Pennsylvania

East North Central
Illinois
Indiana
Michigan
Ohio
Wisconsin

West North Central
Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southeast
Alabama
Delaware
District of Columbia
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

West South Central
Arkansas
Louisiana
Oklahoma
Texas

Mountain
Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Pacific
Alaska
California
Hawaii
Oregon
Washington

Canada

THE FMI DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE 1986

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence.

If you have any questions, please call the research department of FMI - (202)452-8444.

A. General Operations

1. Is your company primarily a: (Please circle one.)
   - a. retailer? 1
   - b. cooperative wholesaler? 2
   - c. voluntary wholesaler? 3
   - d. affiliated wholesaler?. 4

2. What were your company sales in (if 1985 figures are not yet available, please give an estimate):
   - a. 1984? . . . . $ ____________ million
   - b. 1985? . . . . $ ____________ million

3. How many supermarkets does your operation serve/own (a supermarket is a retail food store with annual sales of at least two million dollars)?
   - a. own? . . . . __________ supermarkets
   - b. serve as a wholesaler? . . . . __________ supermarkets

4. What percentage of your total annual shipping volume in dollars is attributed to:
   - a. company owned stores? . . . . _ _ _._ %
   - b. independent food stores? . . . . _ _ _._ %
   - c. other food chains? (11 plus stores). . . . . . . _ _ _._ %
   - d. convenience stores? . . . . _ _ _._ %
   - e. food service/institutional service . . . . _ _ _._ %
   - f. other, please specify ____________________ _ _ _._ %

   TOTAL 100.0%

B. Wholesale Operations If you are a wholesaler, please answer number 5.

5. Does your company provide any of the following services to your retailers? (Please circle yes or no):

	Yes	No		Yes	No
a. advertising program.	1	2	k. equipment procurement.	1	2
b. educational/training program	1	2	l. gross margin report by item.	1	2
c. retail accounting service.	1	2	m. handle private label	1	2
d. member payroll	1	2	n. handle generic label	1	2
e. individual retail pricing program.	1	2	o. discount programs.	1	2
f. real estate & store engineering.	1	2	p. space allocation	1	2
g. interior decor & design service.	1	2	q. scanning support	1	2
h. product movement data.	1	2	r. DSD system	1	2
i. equipment and fixture financing.	1	2	s. other ______________________ (please specify) . .	1	2
j. lease financing.	1	2			

C. Dry Grocery Distribution Center/Section (excluding Cigarettes)

6. Please complete a separate line for each of your Dry Grocery distribution centers/sections:

Dry Grocery Distribution Center/ Section	Total Area in Sq. Ft. (1)	Type of Selection Method (Circle) (2)	Total No. of Employees in Distribution Center/ Section (3)	Average No. of Cases Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per WEEK	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate (4)	Average No. of Inbound Truck Loads Per Week
#01		A B							__.__ %	
#02		A B							__.__ %	
#03		A B							__.__ %	
#04		A B							__.__ %	

D. Health and Beauty Aids/General Merchandise (excluding Cigarettes)

7. Please complete a separate line for each of your distribution centers/sections:

HaBA/GM Distribution Center/ Section	Total Area in Sq. Ft. (1)	Primary Type of Selection Method (Circle) (6)	Total No. of Employees in Distribution Center/ Section (3)	Average No. of UNITS Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per WEEK	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate (4)	Average No. of Inbound Truck Loads Per Week
#01		A B C							__.__ %	
#02		A B C							__.__ %	

Footnotes

(1) Total area includes everything under roof such as receiving, storage and offices which are involved with Dry Grocery Distribution Center. Exclude manufacturing and packing.

(2) Select one primary method per center, i.e. one with greatest volume:
a. manual/conventional selection
b. select to conveyor

(3) Please include all full-time and part-time Distribution Center employees, supervisors, loaders, maintenance, cleaners, clerical, etc., who work in the distribution center/section. If personnel works in more than one section, please estimate the employees by fraction of time spent in each section. This includes direct and indirect labor.

Average No. of Inbound Rail Cars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No. of Cases Received per Direct Labor Hour (5)	Average No.of PALLETS Stored and Replenished Per Direct Labor Hour (5)	Average No. of Cases Selected Per Direct Labor Hour (5)	Average No. of Cases Shipped Per Direct Labor Hour (5)	Average No. of Orders Processed Per Week	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
							Yes No	
							Yes No	
							Yes No	
							Yes No	

Average No. of Outbound Vehicle Loads	Average No. of UNITS Received Per Direct Labor Hour Per Week (5, 7)	Average No. of UNITS Stored and Replenished Per Direct Labor Hour (5)	Average No. of UNITS Selected Per Direct Labor Hour (5, 7)	Average No. of UNITS Shipped Per Direct Labor Hour (5, 7)	Average No. of Orders Processed Per Week	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
							Yes No
							Yes No

Footnotes

(4) Scratch rate is the percentage of items ordered but not shipped to the store.

(5) Only include direct labor hours used to perform that specific task. Direct labor is labor used to physically move merchandise through warehouse.

(6) Select one primary method per center, i.e., one with greated volume.
a. from shelving
b. from flow rack
c. from carousel

(7) A ship pack is the store ordering unit.

D. Methods

8. For each of the following, please indicate how many of your dry grocery warehouses use each method.

		Number of Centers
a. Receiving	count each case	________
	count selected supplier	________
	sample supplier pallets	________
	other (please specify)________	________
b. Put Away	fork lift to reserve slot	________
	pallet jack to aisle	________
	other (please specify)________	________
c. Replenishment	zone patrol	________
	work list or cards	________
	other (please specify)________	________
d. Selection	order list	________
	labels	________
	other (please specify)________	________
e. Loading	case dead pile	________
	pallets	________
	carts	________
	other (please specify)________	________

E. Operations Programs For the Dry Grocery Distribution Center/Section.

9. Did your last physical inventory result in? (Circle one)
a. Dollar Value. . Gain Loss
b. Case Count. . . Gain Loss

10. Do your warehouses have formal supervisor training programs?(check all that apply)
☐ Yes, for new supervisors
☐ Yes, for existing employees
☐ No

11. How many centers use each of the following for reserve slot location control?

	Number of Centers
Manual by fork lift operators	________
Card or pallet tag system	________
Computer control system	________

12. Do you have industrial engineered developed labor standards? Yes No

If yes, do you use them to:
Plan shifts? . . . . Yes No
Track individual's productivity? . . . Yes No
Track area productivity? . . . . Yes No
Track shift productivity? . . . . Yes No

FMI RETAIL OPERATIONS
QUESTIONNAIRE 1986

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in retail supermarket operations. We encourage your participation so that the results may be as representative of the industry as possible. All data will be held in strict confidence. Please answer as many questions as possible. If you have any questions, please call the Research Department of FMI - (202)452-8444.

A. GENERAL OPERATIONS

1. How many supermarkets does your company operate (a supermarket is a retail food store with annual sales of at least two million dollars)? . . . . ____________ supermarkets

2. What were your retail supermarket sales in (if 1985 figures are not yet available, please give an estimate):

a. 1984. . . . . $ ____________ million

b. 1985. . . . . $ ____________ million

3. What were your sales for "identical stores" (those supermarkets which you had in operation throughout the entire two-year period, 1984 and 1985) for:

a. 1984. . . . . $ ____________ million

b. 1985. . . . . $ ____________ million

4. What percent of your operation is supplied by the following:

a. own warehouse . . . . ___ ___ ___ . ___%
b. voluntary wholesaler . . . . ___ ___ ___ . ___%
c. cooperative wholesaler . . . . ___ ___ ___ . ___%
d. unaffiliated wholesaler . . . . ___ ___ ___ . ___%
e. direct vendor deliveries . . . . ___ ___ ___ . ___%

TOTAL 1 0 0 . 0 %

5. What percentage of your total supermarket sales in 1985 is accounted for by:
(If HABA or Tobacco are included in General Merchandise, please indicate so)

a. General Merchandise . . ___ ___ ___ . ___ %
b. Health and Beauty Aids. ___ ___ ___ . ___ %
c. Tobacco . . . . ___ ___ ___ . ___ %

6. Please provide total company data for 1985 for the following items:

a. AVERAGE WEEKLY SALES per supermarket? . . . . $ __,__ __ __,__ __ __

b. AVERAGE WEEKLY SALES PER CHECKOUT? . . . . $ __ __,__ __ __

c. AVERAGE SALE PER CUSTOMER TRANSACTION? . . . . $ __ __.__ __

d. AVERAGE SALES PER LABOR HOUR for store employees? . . . . $ __ __ __.__ __

e. AVERAGE WEEKLY SALES PER SQUARE FOOT of selling area (divide average weekly sales for all your supermarkets in operation the entire year by the number of square feet of selling area - customer area - in those stores)? . . . . $ __ __.__ __

6. Please provide total company data for the following items: (continued from previous page)

f. TOTAL SIZE, in square feet, of your typical store? . . . . __ __ __,__ __ __ (square feet)

g. SELLING AREA, in square feet, of your typical store? . . . . __ __ __,__ __ __ (square feet)

h. AVERAGE RETAIL PRICE PER ITEM for all items sold in your supermarket during a typical month in 1985? . . . . $ __.__ __

i. AVERAGE NUMBER OF DIFFERENT ITEMS your typical supermarket carries (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item)? . . . . __ __,__ __ __ number of items

7. Please complete the following chart for each type of store you operate. If you do not operate a particular store type, enter NA. Even though your company's definitions of store type may differ from the definitions that follow, we ask that you use the formats as defined here. This will help keep the store type data consistent for industry-wide information.

	Conventional Supermarkets (30,000 and under total sq. ft.)	Super Stores (over 30,000 total sq. ft., expanded food and non-food selection)	Combination Stores (over 30,000 total sq.ft., and at least 25% of area in General Merchandise)	Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service)
Number of Each Type of Store	________	________	________	________
Average Weekly Sales per Store	$ __ __ __,__ __ __	$ __ __ __,__ __ __	$ __ __ __,__ __ __	$ __ __ __,__ __ __
Average Weekly Sales per Checkout	$ __ __,__ __ __	$ __ __,__ __ __	$ __ __,__ __ __	$ __ __,__ __ __
Average Sales per Customer Transaction	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __
Sales per Labor Hour	$ __ __ __.__ __	$ __ __ __.__ __	$ __ __ __.__ __	$ __ __ __.__ __
Average Weekly Sales per Sq. Ft. of Selling Area	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __
Average Total Size in Sq. Ft. per store	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __
Average Sq. Ft of Selling Area Per Store	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __
Average Retail Price per Item	$ __.__ __	$ __.__ __	$ __.__ __	$ __.__ __
Average Number of Items Carried	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __

8. If you operate warehouse supermarkets how many are:

A. Upscale, superwarehouse offering several service departments? . . . . ________

B. Warehouse stores with utilitarian fixtures, discount prices? . . . . ________

B. MERCHANDISING

9. In how many supermarkets have you used the following promotional techniques in the past six months:

a. trading stamps? . . . . ___________ supermarkets
b. games? . . . . ___________ supermarkets
c. continuity programs? . . . . ___________ supermarkets
d. in-store coupons? . . . . ___________ supermarkets

10. What percentage of your total sales was spent on supermarket advertising by the company (net of co-op revenue)? ___.___%

11. What percentage of your advertising budget was spent on:

a. newspaper? . . . . ___ ___ ___ .___ %
b. radio? . . . . ___ ___ ___ .___ %
c. television? . . . . ___ ___ ___ .___ %
d. mailer/flyer? . . . . ___ ___ ___ .___ %
e. in-store coupons? . . . . ___ ___ ___ .___ %
f. billboards? . . . . ___ ___ ___ .___ %
g. other? . . . . ___ ___ ___ .___ %
TOTAL 1 0 0 . 0 %

12. How many of your supermarkets are presently accepting credit cards:

a. for grocery items? . . . . ___________ supermarkets
b. for pharmaceutical items and/or
non-foods? . . . . ___________ supermarkets

C. SCANNING

Please check here if you do not have any scanners /_/ and skip to question 17.

13. In how many stores are you now scanning? . . . . ___________ supermarkets

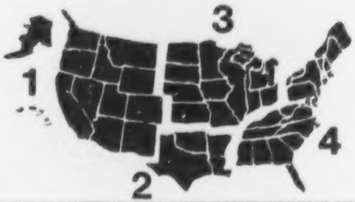
14. In how many stores are you scanning random weight items? . . . . ___________ supermarkets

15. In which of the following ways are you currently using your scanning POS data (Please circle yes or no):

	Yes	No		Yes	No
a. checker performance?	1	2	g. meat department analysis?.	1	2
b. coupon accounting?	1	2	h. produce department analysis?	1	2
c. specials?.	1	2	i. new product evaluation?.	1	2
d. work scheduling?	1	2	j. price elasticity?.	1	2
e. shrink analysis?	1	2	k. reordering?.	1	2
f. shelf allocation?.	1	2	l. other? please specify ___________________ _______________________________________	1	2

	Yes	No
16. Do you have someone specifically responsible for the analysis of scanning data?	1	2

D. CUSTOMER SERVICES



17. For each geographic region in which your company operates, in how many supermarkets are you offering the following services? (If you are not sure of the regional breakout just answer for Total No. of Stores):

Total No. of Stores	1 Mountain & Pacific	2 West South Central	3 North Central	4 East Coast
a. deli offering carry-out items.				
b. restaurant				
c. lunch counter/snack bar. . . .				
d. floral/plant shop.				
e. liquor				
f. wine				
g. beer				
h. catering				
i. service meat				
j. fresh seafood.				
k. pharmacy				
l. scratch and/or bake-off bakery				
m. reading center				
n. cosmetic center.				
o. photographic service center. .				
p. courtesy booth				
q. salad bar				
r. video rental				
s. home delivery services				

RETAIL MEAT OPERATIONS QUESTIONNAIRE 1986

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket meat operations. We encourage your participation so that the results will be as representative as possible. Please answer as many questions as you can. All data will be held in strictest confidence. This questionnaire has been reviewed and approved by FMI General Counsel. If you have any questions, please call the Research Department of FMI-(202) 452-8444.

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1. What percentage of your fresh beef sales are: U.S.D.A.:

prime .... ___ ___ ___ %
choice.................................... ___ ___ ___ %
ungraded or house brand................... ___ ___ ___ %
good...................................... ___ ___ ___ %
standard.................................. ___ ___ ___ %
TOTAL 1 0 0 %

2. What percentage of your meat sales are boneless vs. bone-in?

	CHICKEN	PORK	BEEF
Boneless..............	___ ___ ___%	___ ___ ___%	___ ___ ___%
Bone-in...............	___ ___ ___%	___ ___ ___%	___ ___ ___%
TOTAL	1 0 0 %	1 0 0 %	1 0 0 %

3. What percentage of your fresh beef cuts are received at your stores as:

carcass (sides, quarters).................... ___ ___ ___ %
primals...................................... ___ ___ ___ %
subprimals................................... ___ ___ ___ %
consumer ready retail cuts................... ___ ___ ___ %
TOTAL 1 0 0 %

4. What percentage of your ground beef is ground in the store?.. ___ ___ ___ %

5. What percentage of your ground beef sales are:

regular ground beef.......................... ___ ___ ___ %
lean ground beef............................. ___ ___ ___ %
extra-lean ground beef....................... ___ ___ ___ %
other.. ___ ___ ___ %
TOTAL 1 0 0 %

6. What percentage of your fresh meat volume is received at your stores packaged as:

	BEEF	PORK
vacuum packed........................	___ ___ ___ %	___ ___ ___ %
soft-film overwrapped................	___ ___ ___ %	___ ___ ___ %
other................................	___ ___ ___ %	___ ___ ___ %
TOTAL	1 0 0 %	1 0 0 %

7. What percentage of meat for your supermarkets is supplied by:

company-owned warehouse/processing plant...... ___ ___ ___ %
packer direct deliver......................... ___ ___ ___ %
wholesaler direct deliver..................... ___ ___ ___ %
TOTAL 1 0 0 %

8. What percentage of fresh beef is sold at retail as:

conventional retail cuts/packaging............ __________ %
subprimal, vacuum packaged.................... ___ ___ ___ %
subprimal, non-vacuum packaged................ ___ ___ ___ %
TOTAL 1 0 0 %

9. Please check which of the following are available to your customers (check as many as apply):

meat recipes.........................☐
store coupons for meat items.........☐
nutrition information................☐
other____________________________..☐
cooking classes involving meat.......☐
meat cutting charts/explanations.....☐
customer meat information center.....☐

10. What percentage of your total retail sales in 1985 was accounted for by the meat department?........___ ___ ___ %

11. For your company's typical meat department in 1985 what was the:

a. average number of employees per store, including the department manager.........................__________
b. percentage of meat department sales accounted for by labor costs................................__________%
c. total average pounds per man hour..__________lbs
d. percentage of total store area devoted to meat receiving, preparation and storage...............__________%

12. What percentage of your meat sales are:

service meats.................................___ ___ ___ %
self-service meats............................___ ___ ___ %
TOTAL 1 0 0 %

13. On the average, how many different fresh meat items does your meat department carry in its display case?..__________items

14. What percentage of your typical meat department sales is:

beef..___ ___ ___ %
pork..___ ___ ___ %
veal..___ ___ ___ %
lamb..___ ___ ___ %
poultry.......................................___ ___ ___ %
fish and seafood..............................___ ___ ___ %
processed/frozen..............................___ ___ ___ %
other...___ ___ ___ %

15. What percentage of your meat products are scanned?............

☐ Do not have scanners
☐ Have scanners, but do not scan meat products
☐ Scan ___ ___ ___% of our meat products

FACTUAL INFORMATION

16. What do you estimate your annual total company food sales will be for 1985 (approximately)?....$______________million

17. What is the total number of supermarkets you will have in operation at the end of 1985?.........__________supermarkets
(Supermarkets are those food stores with $2 million of annual sales.)

ELECTRONIC FUNDS TRANSFER
1986

This questionnaire is part of an annual FMI industry study. It is designed to explore the use of Automated Teller Machines and other non-ATM financial devices in supermarkets. Please answer as many questions as you can. All data will be held in strict confidence. If you have any questions, please call the Research Department of FMI -- (202)452-8444.

---

1. Does your company operate any of the following Electronic Financial Services in its supermarkets?

   A. Automated Teller Machines .... ☐ No ☐ Yes, in how many supermarkets ______________

   how many total machines ______________

   B. Non-ATM electronic financial devices... ☐ No ☐ Yes, in how many supermarkets ______________
   (e.g. clerk operated payment/voucher systems)

2. If your company does not presently own or operate any Electronic Financial Services, do you expect to install any of the following systems in any of your stores within:

	the next two years?		the next five years?	
A. ATM	☐ yes	☐ no	☐ yes	☐ no
B. Non-ATM Electronic Financial Services.	☐ yes	☐ no	☐ yes	☐ no

If your company does not operate ATMs, please go to question 4.

---

3. Please answer the following questions only if your company operates Automated Teller Machines. Please estimate if necessary. Do NOT answer for non-ATM terminals.

   A. In 1985, how many transactions did a typical ATM machine average per week? ___,___ ___ ___ transactions/machine/month

   B. What percentage of all ATM transactions in 1985 were:

   a. Cash Dispensing/Withdrawals.................. ___ ___ ___ %
   b. Deposit Taking.................. ___ ___ ___ %
   c. Balance Inquiry.................. ___ ___ ___ %
   d. Account/Balance Transfer.................. ___ ___ ___ %
   e. Other.................. ___ ___ ___ %
   TOTAL.................. 1 0 0 %

   C. Who owns the ATM terminals?

   a. Bank.................. ______________ machines
   b. Other Financial Institution.................. ______________ machines
   c. Supermarket Company.................. ______________ machines
   d. Third Party Service/Provider.................. ______________ machines
   e. State Food Association.................. ______________ machines
   f. Food Wholesaler.................. ______________ machines
   g. Other.................. ______________ machines

   D. How are you compensated by the owners of the ATM terminals?

   a. Space Rental.................. ______________ machines
   b. Transaction fee.................. ______________ machines
   c. Space & Transaction Fee.................. ______________ machines
   d. Other.................. ______________ machines

E. How has the installation of ATM's effected the volume of checks or cash at your checkout lane?

CHECKS (Please check one)	CASH (Please check one)
☐ Check Volume Increased	☐ Cash Volume Increased
☐ Check Volume Decreased	☐ Cash Volume Decreased
☐ Check Volume Remained the Same	☐ Cash Volume Remained the Same

F. On a Scale of 1 to 5, with 1 representing poor and 5 excellent, please rate the operations of the ATMs in your supermarkets.

	Poor				Excellent
a. Overall Performance...........	1	2	3	4	5
b. Customer Acceptance...........	1	2	3	4	5
c. Customer Usage................	1	2	3	4	5
d. Customer Convenience..........	1	2	3	4	5
e. Ease of Use...................	1	2	3	4	5
f. Hardware Reliability..........	1	2	3	4	5
g. Maintenance...................	1	2	3	4	5
h. Reduction of Store Operating Expenses.......................	1	2	3	4	5

4. Do you operate EFT-POS direct debit at the checkout which is CLEARED THROUGH A NETWORK?

☐ Yes, installed in ______________ supermarkets
☐ Only as a pilot in a few stores for the time being
☐ No, but expect to have some installations in the
next.........☐ two years ☐ five years

5. Do you operate EFT-POS at the checkout which is CLEARED THROUGH AN AUTOMATED CLEARINGHOUSE (ACH)?

☐ Yes, installed in ______________ supermarkets
☐ Only as a pilot in a few stores for the time being
☐ No, but expect to have some installations in the
next.........☐ two years ☐ five years

FACTUAL INFORMATION

6. What do you estimate your annual total company food sales will be for 1985(approximately)? ______________ million

7. What is the total number of supermarkets you will have in operation at the end of 1985? ______________ supermarkets
(Supermarkets are those food stores with $2 million in annual sales)

FMI'S 1986 GENERAL MERCHANDISE/ HEALTH AND BEAUTY AIDS QUESTIONNAIRE

This questionnaire is part of the annual FMI Food Marketing Industry Speaks report. The purpose of the study is to provide the supermarket industry with a profile of the General Merchandise (GM) and Health and Beauty Aid (HaBA) departments. Please complete as much of the questionnaire as you can and return it in the attached envelope to FMI. Please call the Research Department at 202 452-8444 if you have any questions. Thank you for assisting us. By completing this survey you will receive a complimentary final report which provides information on these areas as well as information on general supermarket operations.

Please answer questions 1 thru 3 for all of your stores and for each store type you operate. If you can not answer by store type, please just respond for "total no. of stores".*

	Total No of Stores	Conventional Stores	Superstores	Combination Stores	Warehouse Stores
1. In how many of your supermarkets do you operate General Merchandise departments?					
2. In how many of your supermarkets do you operate Health and Beauty Aid departments?					
3. If GM and HaBA are not separate departments, please indicate the number of combined GM/HaBA departments you operate.					

If you do not operate any General Merchandise or Health and Beauty Aid Departments skip to Question 16.

---

4. What percentage of your general merchandise sales are due to SEASONAL products, products which are only stocked for a specific season of the year?...__ __ . __%

5. Please check up to three reasons your company adds or deletes items in the General Merchandise department.

ADDITION:
☐ Manufacturer's track record
☐ Manufacturer's estimate of sales
☐ Customer convenience
☐ Allowances
☐ Demographics
☐ Popularity of product
☐ Advertising
☐ Other________________________

DELETION:
☐ Lack of sales
☐ Lack of profitability
☐ Other________________________
☐ Duplicate of better selling item
☐ Manufacturer discontinues item

*Store Types
Conventional Supermarket - Under 30,000 total square feet.
Super Stores - More than 30,000 total square feet, with expanded food and non-food selection.
Combination Stores - More than 30,000 total sq. ft., at least 25% of store area in General Merchandise.
Warehouse Stores - Has utilitarian fixtures, emphasizes lower prices at the expense of customer service.

6. Please indicate how many of your supermarkets carry each of the following product lines and the average number of linear feet per store devoted to each.

General Merchandise	Number of Supermarkets	Linear Feet Per Store
a. Houseware**........		
b. Automotive Supplies		
c. Magazines..........		
d. Books..............		
e. Stationery.........		
f. Greeting Cards.....		
g. Pet Supplies.......		
h. Toys...............		
i. Other____________		
____________		

Health and Beauty Aids	Number of Supermarkets	Linear Feet Per Store
a. Analgesics........		
b. Shampoos..........		
c. Dental Products...		
d. Deodorants........		
e. Cold Medicines....		
f. Shaving Items.....		
g. Vitamins..........		
h. Mouthwashes.......		
i. Hair conditioners.		
j. Other__________		
__________		

7. Please list three or four General Merchandise and Health and Beauty Aid products which have had the greatest sales growth in 1985.

General Merchandise	Health & Beauty
a.______________	a.______________
b.______________	b.______________
c.______________	c.______________
d.______________	d.______________

8. Why do you have General Merchandise departments in your stores? (Please check all that apply)

☐ To increase overall store sales
☐ To offer more one-stop shopping
☐ To increase the store's average gross margin
☐ Increased competition from other stores
☐ Appeals to consumer wants
☐ Increases dollar profits
☐ Other______________

9. What percentage of General Merchandise products are handled by the following distribution and merchandising systems?

Selection is done by:
a. Supermarket company............................__ __ __ . __%
b. Wholesaler.... ....__ __ __ . __%
c. Service merchandiser...........................__ __ __ . __%
d. Other ______________________________.......__ __ __ . __%
TOTAL 1 0 0 . 0%

Stock Maintenance is done by:
a. Service merchandiser...........................__ __ __ . __%
b. Store personnel................................__ __ __ . __%
c. Other ______________________________.......__ __ __ . __%
TOTAL 1 0 0 . 0%

**Housewares - Kitchen gadgets including bakeware, bowls, knives etc., not including soft products such as towels.

10. What percentage of your general merchandise is warehoused by your own warehouse/wholesaler? ___ ___ ___ . ___%

11. How does the handling of your General Merchandise products differ from other typical store items?

____

____

____

12. Please supply the following information describing your typical GM and HaBA departments? If you can not answer by store type, just respond in the "all stores" category.*

		All Stores	Combination Stores	Superstores	Conventional Stores	Warehouse Stores
a.	Percent of selling area per store devoted to the GM and HaBA depts:	GM				
		HaBA				
b.	Number of store personnel per store in the GM and HaBA departments:	GM				
		HaBA				
c.	Sales per labor hour for the GM and HaBA departments:	GM				
		HaBA				
d.	Number of items per store for the GM and HaBA departments:	GM				
		HaBA				
e.	Number of man hours per store, per week for the GM and HaBA departments:	GM				
		HaBA				
f.	Typical size of total store in sq. ft. for a store with a GM or HaBA dept.:	GM				
		HaBA				

13. What percent of your company's total advertising budget is devoted to:
General Merchandise ___ ___ . ___%
Health & Beauty Aids ___ ___ . ___%

*Store Types Conventional Supermarket - Under 30,000 total square feet.
Super Stores - More than 30,000 total square feet, with expanded food and non-food selection.
Combination Stores - More than 30,000 total sq. ft., at least 25% of store area in General Merchandise.
Warehouse Stores - Has utilitarian fixtures, emphasizes lower prices at the expense of customer service.

14. Do you plan to add any new General Merchandise product lines to your stores in the next two years? ☐Yes ☐No

If YES, what product lines do you plan to add? In how many supermarkets?

Product Line	No. of Stores

15. Do you plan to add any new Health and Beauty Aid product lines in the next two years? ☐Yes ☐No

IF YES, what product lines do you plan to add? In how many supermarkets?

Product Line	No. of Stores

GENERAL INFORMATION

16. What do you estimate your total annual company food sales will be for 1985? $________________

17. What is the total number of supermarkets you will have in operation at the end of 1985? (Supermarkets are those food stores with $2 million annual sales) __________supermarkets

FMI

FOOD MARKETING INSTITUTE